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PATENT ABSTRACTS OF JAPAN

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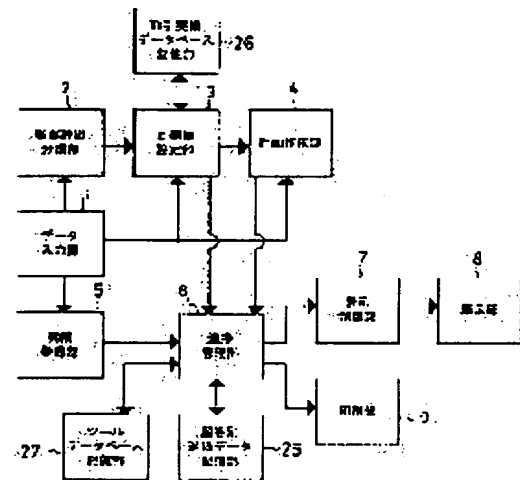
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(54) BUSINESS EFFICIENCY IMPROVEMENT SUPPORT SYSTEM

(57)Abstract:

PROBLEM TO BE SOLVED: To optimally standardize the business operation and to drastically improve the business efficiency.

SOLUTION: This system is provided with a progress control part 6 controlling the progress of business activities by dividing them into three kinds of a business basic action being repeatedly enforced by a prescribed cycle, a business effective action being enforced according to a preliminarily set schedule and a business negotiation process in which a series of business action in the business negotiations are arranged, based on each data of the business activity plan prepared by a plan preparation part 4 and the activity result registered by an actual result registration part 5. By exactly recognizing the progress of the business activities from the three kinds of viewpoints of the business valid action, the business basic action and the business negotiation process whose natures are different in various kinds of business activities, the plan of optimum business activities for improving business efficiency can easily be prepared by a businessman.



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CLAIMS

[Claim(s)]

[Claim 1] The improvement support system in operating productivity for managing the progress, while drawing up the operating-activities plan for various customers characterized by providing the following. A planned [to draw up the operating-activities plan for the above-mentioned various customers] creation means. An actual result registration means to register the actual activity result based on the operating-activities plan drawn up by the above-mentioned planned creation means. A status-control means divide and manage to three kinds of the business talk processes which put in order the operating basic action of repeating and carrying out progress of operating activities in a predetermined cycle based on each data of the activity result registered by the operating-activities plan and the above-mentioned actual result registration means created by the above-mentioned planned creation means, the operating effective action which carry out as the schedule set up beforehand, and a series of doing business in a business talk.

[Claim 2] While the above-mentioned planned creation means creates the operation plan of the above-mentioned operating basic action, the above-mentioned operating effective action, and the above-mentioned business talk process Do to draw up the above-mentioned operating-activities plan by registering each doing business performed according to a day based on the above-mentioned operation plan. The improvement support system in operating productivity according to claim 1 characterized by having a display-control means to control to divide and display the operation plan of the above-mentioned operating basic action, the above-mentioned operating effective action, and the above-mentioned business talk process on the screen for registering each doing business performed according to the above-mentioned day.

[Claim 3] The above-mentioned status-control means is based on each data of the activity result registered by the operation plan of various operating basic actions and the above-mentioned actual result registration means which were created by the above-mentioned planned creation means. It manages whether when having registered each doing business performed according to the above-mentioned day, the above-mentioned various operating basic actions occur within the operation period based on the above-mentioned predetermined cycle. the above-mentioned display-control means The improvement support system in operating productivity according to claim 2 characterized by controlling to display on the screen for registering each doing business which performs only the operating basic action done to it being within the operation period based on the above-mentioned predetermined cycle by the above-mentioned status-control means according to the above-mentioned day.

[Claim 4] The above-mentioned status-control means is based on each data of the activity result registered by the operation plan of various operating effective actions and the above-mentioned actual result registration means which were created by the above-mentioned planned creation means. It manages whether it is within the operation period based on the schedule in which the above-mentioned various operating effective actions carried out [above-mentioned] a setup when having registered each doing business performed according to the above-mentioned day. the above-mentioned display-control means The improvement support system in operating productivity according to claim 2 characterized by controlling to display on the screen for registering each doing business which performs only the operating effective action done to it being within the operation period based on the schedule which carried out [above-mentioned] a setup by the above-mentioned status-control means according to the above-mentioned day.

[Claim 5] The operation plan of the various operating basic actions that the above-mentioned status-control means was created by the above-mentioned planned creation means, and various operating effective actions, It is based on each data with the activity result registered by the above-mentioned actual result registration means. [whether when having registered each doing business performed according to the above-mentioned day, the above-mentioned various operating basic actions occur within the operation period based on the above-mentioned predetermined cycle, and] It manages whether it is within the operation period based on the schedule in which the above-mentioned various operating effective actions carried out [above-mentioned] a setup when having registered each doing business performed according to the above-mentioned day. and the above-mentioned display-control means By the above-mentioned status-control means S that it may display on the screen for registering each doing business which performs only the operating effective action done to it being within the operation period based on the operating basic action done to it being within the operation period based on the above-mentioned predetermined cycle, and the schedule which carried out [above-mentioned] a setup according to the above-mentioned day The improvement support system in operating productivity according to claim 2 characterized by controlling.

[Claim 6] The improvement support system in operating productivity for managing the progress, while drawing up the

operating-activities plan for various customers characterized by providing the following. A planned [to create] by registering each doing business performed according to a day based on the operation plan while creating the operation plan of the business which includes the operating-activities plan for the above-mentioned various customers for various doing business] creation means. A display-control means to control to display on the screen for registering each doing business which performs only the action which became the timing which should be carried out based on the above-mentioned operation plan among various doing business contained in the operation plan of the business created by the above-mentioned planned creation means according to the above-mentioned day.

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DETAILED DESCRIPTION

[Detailed Description of the Invention]

[0001]

[The technical field to which invention belongs] Especially this invention uses performing efficiently the operating activities which a business manager performs about the improvement support system in operating productivity for the system for supporting, and is suitable.

[0002]

[Description of the Prior Art] Generally, since operating activities were that human being carries out to human being, the standardization or systematization was conventionally difficult. For this reason, while computerization progressed in fields, such as sales management, and manufacture management or organization management, many business managers were performing operating activities, depending on experience and intuition.

[0003] While a commercial scene goes into a low-growth time and competition intensifies increasingly on the other hand, corporate management is improved and enabling it to raise many profits for management property, such as the fewest possible time, a man, and a facility, is noted increasingly. Thus, in order to raise the productivity of business, it is necessary to perform operating activities by the suitable method.

[0004]

[Problem(s) to be Solved by the Invention] However, since the method of operating activities had become dependent on the business manager in almost all companies, a business manager's belief, a result, etc. had produced unevenness and futility in operating activities. As for the business manager who improved the actual result and has been said to be excellent in it, it was actual to have devised personally and to have found out the optimal operating method by one's force.

[0005] However, as for a business manager excellent in a company, only a mere handful exists. Therefore, in order to essentially raise operating productivity innovatively as a company, it is necessary to improve the so-called contents of activity of standard business managers other than an excellent business manager.

[0006] Moreover, a business manager's effort came to be somewhat mitigated with the spread of the personal computers in recent years by using a personal computer for having done the work of having entered an activity plan in the week activity plan document drawn up with the word processor etc. in handwriting conventionally, having totaled the result, and harnessing in a degree.

[0007] However, the application software of the personal computer which the business manager is using is word-processing software, a spreadsheet or a database, etc. at most, and, moreover, the usage is left to each one of discretion. Now, the personal computer was only used as a tool of mere paperwork, and moreover, since many efforts were required in order to use the multi-functionalized application software, complicated and supporting improvement in operating productivity were not completed at all.

[0008] this invention is accomplished in view of such the actual condition, attains the optimal standardization of operating activities, and aims at enabling it to raise operating productivity innovatively.

[0009]

[Means for Solving the Problem] While the improvement support system in operating productivity of this invention draws up the operating-activities plan for various customers A planned [to be an improvement support system in operating productivity for managing the progress, and draw up the operating-activities plan for the above-mentioned various customers] creation means, An actual result registration means to register the actual activity result based on the operating-activities plan drawn up by the above-mentioned planned creation means, It is based on each data of the activity result registered by the operating-activities plan and the above-mentioned actual result registration means which were created by the above-mentioned planned creation means. The operating basic act of repeating and carrying out progress of operating activities in a predetermined cycle, It is characterized by having a status-control means to divide into three kinds of business talk processes which put in order the operating effective act carried out as the schedule set up beforehand, and a series of doing business in a business talk, and to manage.

[0010] The place by which it is characterized [of this invention / other] the above-mentioned planned creation means While creating the operation plan of the above-mentioned operating basic action, the above-mentioned operating effective action, and the above-mentioned business talk process Do to draw up the above-mentioned operating-activities plan by registering each doing business performed according to a day based on the above-mentioned operation plan. It is characterized by having a display-control means to control to divide and display the operation plan of the above-mentioned operating basic action, the above-mentioned operating effective action, and the above-mentioned business talk processes on the screen for registering each doing business performed according

to the above-mentioned day.

[0011] The place by which it is characterized [of others of this invention] the above-mentioned status-control means It is based on each data of the activity result registered by the operation plan of various operating basic actions and the above-mentioned actual result registration means which were created by the above-mentioned planned creation means. It manages whether when having registered each doing business performed according to the above-mentioned day, the above-mentioned various operating basic actions occur within the operation period based on the above-mentioned predetermined cycle. the above-mentioned display-control means It is characterized by controlling to display on the screen for registering each doing business which performs only the operating basic action done to it being within the operation period based on the above-mentioned predetermined cycle by the above-mentioned status-control means according to the above-mentioned day.

[0012] The place by which it is characterized [of others of this invention] the above-mentioned status-control means It is based on each data of the activity result registered by the operation plan of various operating effective acts and the above-mentioned actual result registration means which were created by the above-mentioned planned creation means. It manages whether it is within the operation period based on the schedule in which the above-mentioned various operating effective acts carried out [above-mentioned] a setup when having registered each doing business performed according to the above-mentioned day. the above-mentioned display-control means It is characterized by controlling to display on the screen for registering each doing business which performs only the operating effective act done to it being within the operation period based on the schedule which carried out [above-mentioned] a setup by the above-mentioned status-control means according to the above-mentioned day.

[0013] The place by which it is characterized [of others of this invention] the above-mentioned status-control means The operation plan of the various operating basic acts created by the above-mentioned planned creation means and various operating effective acts, It is based on each data with the activity result registered by the above-mentioned actual result registration means. [whether when having registered each doing business performed according to the above-mentioned day, the above-mentioned various operating basic acts occur within the operation period based on the above-mentioned predetermined cycle and] It manages whether it is within the operation period based on the schedule in which the above-mentioned various operating effective acts carried out [above-mentioned] a setup when having registered each doing business performed according to the above-mentioned day. and the above-mentioned display-control means By the above-mentioned status-control means It is characterized by controlling to display on the screen for registering each doing business which performs only the operating effective act done to it being within the operation period based on the operating basic act done to it being within the operation period based on the above-mentioned predetermined cycle, and the schedule which carried out [above-mentioned] a setup according to the above-mentioned day.

[0014] While drawing up the operating-activities plan for various customers, the place by which it is characterized [of others of this invention] Are an improvement support system in operating productivity for managing the progress, and the operating-activities plan for the above-mentioned various customers A planned [to create by registering each doing business performed according to a day based on the operation plan while creating the operation plan of the business containing various doing business] creation means, The inside of various doing business contained in the operation plan of the business created by the above-mentioned planned creation means, It is characterized by having a display-control means to control to display on the screen for registering each doing business which performs only the action which became the timing which should be carried out based on the above-mentioned operation plan according to the above-mentioned day.

[0015] Since this invention consists of the above-mentioned technical means, in various operating activities, the operating effective action and the operating basic action that properties differ, and a business talk process arrange separately, respectively, a status control comes to be carried out, and it becomes possible to grasp progress of operating activities exactly from the three above-mentioned kinds of viewpoints.

[0016] Moreover, since the operating basic action and the operating effective action by which the status control is carried out as mentioned above separately, and a business talk process divide into the registration screen of doing business performed according to a day and it comes to be displayed on it according to other features of this invention, the business manager who forms an operating-activities plan becomes that it is possible to arrange and understand the action which should be done now from the three above-mentioned kinds of viewpoints, in case each doing business which performs according to the above-mentioned day registers.

[0017] Moreover, the inside of the various operating basic actions which were beforehand created as an operation plan of operating activities according to the feature of others of this invention, or various operating effective actions, Since only the action which became the timing which should be carried out based on the above-mentioned operation plan comes to be displayed on the registration screen of each doing business performed according to a day, the business manager who looked at the registration screen becomes possible [checking to timely the optimal doing business which should be carried out day by day].

[0018]

[Embodiments of the Invention] Below, 1 operation form of the improvement support system in operating productivity by this invention is explained based on a drawing. Drawing 1 is the functional block diagram showing the element-structure of the improvement support system in operating productivity by this operation form. Moreover, drawing 2 is drawing showing the hardware composition for carrying out concretely each functional block shown in drawing 1.

[0019] As shown in drawing 2, the improvement support system in operating productivity of this operation form is realized by the personal computer system which has generally spread. That is, as for a keyboard and 23, in this drawing, the main part of a personal computer with which 21 built in CPU, ROM, RAM, etc., and 22 are [a mouse and 24] display units. Although illustration has not been carried out, it is possible for two or more main parts 21 of a personal computer to be connected through a network, and for it to be made to exchange data mutually.

[0020] 25 is the status-control data-storage section classified by customer, and the progress data according to customer based on the contents of a plan of the operating activities inputted by support organizations, such as a visit plan inputted by the business manager, and a visit result or a manager, etc. are memorized. 26 is the dealings actual result data-storage section, and the data about a dealings actual result with a customer are memorized.

[0021] 27 is the tool database storage section, and in operation of operating activities, the data of required various tools match it with each doing business which constitutes the above-mentioned operating activities, and it is memorized. As the above-mentioned various tools, the interest attachment tool to a customer, a reaction inquiry tool, the interest attachment status-control sheet classified by customer, a business chance information gathering tool, a key man evaluation tool, etc. can be mentioned, for example.

[0022] 28 is the required tool creation section, actually creates the tool chosen from various kinds of tools memorized by the above-mentioned tool database storage section 27, and consists of printers for printing the documents addressed to a customer for example, etc.

[0023] In addition, the status-control data-storage section 25 classified by customer, the above-mentioned dealings actual result data-storage section 26, and the above-mentioned tool database storage section 27 are constituted by storages, such as a hard disk and a floppy disk. When it consists of hard disks, it may be built in the main part 21 of a personal computer. Moreover, when it consists of floppy disks, it is also possible to use it at the form terminal which does not illustrate the floppy disk.

[0024] A business manager draws up a operating plan using the personal computer system of such composition, carries out the plan, and carries out operating activities by evaluating an execution result. Thereby, to the former depending on experience of a business manager or intuition, with this operation form, standardization of operating activities can be attained and operating productivity can be raised so that it may explain below.

[0025] Next, in drawing 1, 1 is the data input section and is constituted by the keyboard 22 and mouse 23 which were shown in drawing 2. 2 is customer evaluation / classification section, and evaluates and classifies various customers under a fixed error criterion. Hereafter, the method of this customer evaluation is explained based on drawing 3 shown below.

[0026] This operation form is estimating the customer from two sides of purchasing power evaluation and dealings evaluation so that clearly from drawing 3. As evaluation criteria of the purchasing power evaluation which evaluates a customer's purchasing power objective, there are annual sales, a manager's motivation, possibilities, a site condition, a rate of sales extension, etc., and these items are grasped as a thing in consideration of the potential (capacity) of a partner company (customer), for example.

[0027] Moreover, as evaluation criteria of the dealings evaluation which evaluates a dealings situation with its company, there are annual dealings, a rate of a gross income, a pulse duty factor, recovery conditions, etc., and these items are grasped as a thing in consideration of the position of a self-company, for example.

[0028] Moreover, customer evaluation / classification section 2 of this operation form divides the customer into four classifications based on the evaluation performed as mentioned above. That is, as shown in drawing 3 (a), according to the height of each evaluation, the customer is divided [the result of purchasing power evaluation] into four classifications, a development visitor, an expansion visitor, a maintenance visitor, and a result visitor, for the result of dealings evaluation for the horizontal axis for the vertical axis.

[0029] Here, each of results of purchasing power evaluation and results of dealings evaluation is high customers, and a development visitor means the customer who moreover has possibilities at a good customer. Moreover, although the result of dealings evaluation is low, the result of purchasing power evaluation is a high customer, and an expansion visitor will mean a customer's thing which dealings may expand further, if a certain improvement is added to operating activities.

[0030] Moreover, although the result of dealings evaluation is high, the result of purchasing power evaluation is a low customer, and although a maintenance visitor is a good customer, he means the customer who lacks in possibilities. Furthermore, each of results of purchasing power evaluation and results of dealings evaluation is low customers, and a result visitor means a customer without possibilities.

[0031] With this operation form, if two or more kinds of the numeric values and the contents which should be inputted to each item of purchasing power evaluation and dealings evaluation are beforehand registered into the system and a manager chooses one from the inside with a mouse 23, the selected contents will be automatically transposed to the evaluating point of five-point full marks by customer evaluation / classification section 2. And the evaluating point for each [these] evaluation criteria of every is totaled automatically, and each customer is divided into four classifications when the total result is plotted by the system of coordinates shown in drawing 3 (b).

[0032] It returns and explains to drawing 1 again. 3 is the desired value setting section and sets up the desired value of the number of times of a month-long visit according to customer. That is, a business manager inputs the desired value of the optimal number of times of the month-long visit classified by customer using the data input section 1, in order to realize the dealings budget numeric value defined according to the dealings actual result of the past memorized by the dealings actual result database storage section 26 based on the result of the evaluation and the classification by the above-mentioned customer evaluation / classification section 2.

[0033] Here, a business manager can distribute now to the customer who wants to carry out dealings expansion of the operating visit force proper by setting up desired value so that the number of times of a visit may increase to the clarified customer who wants to carry out dealings expansion by the evaluation and the classification by the above managers. In addition, in order to raise operating productivity efficiently, it is desirable to distribute many operating force in order of a development visitor, an expansion visitor, a maintenance visitor, and a result visitor.

[0034] In addition, since the result of the evaluation and the classification by the above-mentioned customer evaluation / classification section 2 is reflected by being displayed in the setting screen of the desired value which is not illustrated by different color for every classification to which a customer name belongs, a business manager can understand at a glance to which customer many number of times of a visit should be set up.

[0035] By the way, conventionally, although sales management data existed, this sales management data was what performs only dealings evaluation from the position of a self-company chiefly. On the other hand, with this operation gestalt, purchasing power evaluation is also performed like drawing 3, a customer's potential is also taken into consideration and evaluation and the classification are performed. Thereby, a customer can be evaluated more to accuracy and a business manager can distribute now to the customer who wants to carry out dealings expansion of the limited operating visit force proper.

[0036] Through the status-control section 6, the desired value of the number of times of the month-long visit classified by customer set up by the above-mentioned desired value setting section 3 is given to the status-control data-storage section 26 classified by customer, and is memorized. Moreover, the desired value of the above-mentioned number of times of the month-long visit classified by customer memorized by the status-control data-storage section 26 classified by customer is given to the display-control section 7 through the status-control section 6, and is displayed on a display 8 according to a predetermined form under control by this display-control section 7.

[0037] Drawing 4 is drawing showing an example of the screen displayed on the above-mentioned display 8, and shows the month-long visit schedule / actual result input screen for business managers. The customer name which the business manager is taking charge of is classified by color in the turn that many a development visitor, an expansion visitor, maintenance visitors, result visitors, and operating force should be distributed, and it is expressed as this screen by list. Thus, with this operation gestalt, creativity is put so that a more important customer may jump in to an eye effectively sequentially from a top.

[0038] Moreover, the desired value of the number of times of a visit set up in the desired value setting section 3 as mentioned above is reflected and displayed on the schedule / actual result display area 41 in drawing 4. That is, in above-mentioned schedule / actual result display area 41, unevenness of field 41a enclosed with the thick line expresses the desired value of the number of times of a visit (this field is hereafter called number-of-times viewing area of a visit). That is, the number of **s (in fact, the background color of a schedule / actual result display area 41 is gray, and ** in number-of-times viewing-area of visit 41a is distinguished by being white and being displayed) in this field 41a corresponds to the desired value of the number of times of a visit.

[0039] Again, in drawing 1, 4 is the planned creation section and draws up a business manager's operating-activities plan (a business talk process is included) based on the data into which the business manager and the manager operated and inputted the data input section 1. At this time, a manager registers the operation plan of various operating activities. Moreover, a business manager registers each doing business performed on the above-mentioned visit scheduled day based on the above-mentioned operation plan while inputting the visit scheduled day. Moreover, 5 is the actual result registration section, and when a business manager actually performs the planned operating activities, it registers the visit result as an actual result.

[0040] Although drawing 4 and drawing 5 are drawings showing the example of the month-long visit schedule / actual result input screen for business managers, after performing an actual result input, in order to perform a schedule input, with this operation gestalt, the screen of actual result input mode like drawing 4 appears first. In addition, the change to schedule input mode is performed by pushing a schedule / actual result change button 43.

[0041] In drawing 4 and drawing 5, the number in white ** in number-of-times viewing-area of visit 41a expresses the visit scheduled day and the visit enforcing date. The visit scheduled day is expressed with a blue number, and it is made to express a visit enforcing date with a red number here. In addition, the date of a red display is expressed with the usual number on account of a drawing, and the date of a blue display is expressed with the number with 0. Thus, with this operation gestalt, since it is made to display the date of a visit schedule, and the date of visit implementation by different color, both are distinguishable at a glance.

[0042] Moreover, the portion shown with the slash in the above-mentioned number-of-times viewing-area of visit 41a is a field currently displayed in yellow in fact. This field has few days which it actually visited to the number-of-times desired value of a month-long visit shown by the number of **s, and it is displayed in order that the degree of progress may give warning to a low case, and the customer who should visit to top priority at present, and its number of times are shown. Therefore, the field of this yellow display increases, so that it goes to the end of the month.

[0043] In case the actual result which it visited is inputted, the work of burying a visit enforcing date is done on each ** in number-of-times viewing-area of visit 41a shown in drawing 4. As operation, a mouse cursor is placed on the date which carried out the visit in the date selection area 42, and mouse button is clicked thereby, as the selected date runs to a schedule / actual result display area 41 according to the animation effect, it moves automatically, and the red number is buried in an order from the head by each ** in visit time numeral field 41a.

[0044] If all white **s about a certain customer in the above-mentioned number-of-times viewing-area of visit 41a

are buried with a red number at this time, it will mean attaining a target about the customer. When a target is attained, it is made to tell that the target was attained with this operation gestalt by taking out a sound effect from the loudspeaker which is not illustrated, or displaying a message on a display 8.

[0045] Moreover, in case a visit plan is inputted, first, a schedule / actual result change button 43 is pushed, and schedule input mode is chosen. Then, it changes from the screen of drawing 4 to the screen of drawing 5, and the date in the date selection area 42 changes to a schedule input. At this time, the number currently displayed in red in actual result input mode till then is blue, and comes to be displayed. Moreover, the area of ** of the yellow in the above-mentioned number-of-times viewing-area of visit 41a also changes.

[0046] Next, the visit plan is drawn up by carrying out the mouse click of the date in the date selection area 42, and inputting the visit scheduled day the same with having inputted the visit enforcing date. In this way, an input of the date of a visit schedule displays the sum total of the visit number of cases for with [every] a day on the visit number-of-cases area 44. Thereby, as compared with the average visit number of cases per [which a business manager can visit] day, it can check whether it is realizable.

[0047] In addition, at drawing 4 and drawing 5, although the month-long visit schedule / actual result input screen about the existing customer are shown, even if there are not the customer from whom the visit purpose differs greatly, for example, a new exploitation customer, and direct dealings, about the information source which offers various information, similarly, they switch a screen and can operate it with this operation gestalt. The situation of a visit schedule of these whole various customers is displayed by the bar graph 45 down the screen.

[0048] Thus, with this operation gestalt, in case a visit plan is drawn up, by seeing the number of white **s in number-of-times viewing-area of visit 41a, the number-of-times desired value of a month-long visit can be checked easily, and the consciousness of distributing more visit schedules to a customer with many white **s can be worked. Moreover, to the customer to whom warning of a yellow display is carried out, the consciousness of setting up a visit schedule by top priority can also be worked. For this reason, the formulation of a visit plan and the check of an actual result which always took into consideration achievement of the number-of-times desired value of a visit can be performed now.

[0049] A business manager draws up an operating-activities plan by inputting into the planned creation section 5 the data for the purpose of [the] a visit (doing business) other than the visit scheduled day mentioned above. For example, if the mouse click of the date on the 5th currently displayed in the date selection area 42 is carried out when forming the visit plan on September 5 of "Nakamura" in the month-long visit schedule / actual result input screen of drawing 5, after the date is buried by number-of-times viewing-area of visit 41a according to the animation effect, a screen like drawing 6 will appear.

[0050] In the screen shown in drawing 6, a list indication of the effective action (operation plan) which should be done as business which the manager memorized beforehand in the progress data-storage section 25 classified by customer using the planned creation section 4 is given in the downward large box 61. The operating basic action which should be carried out periodically [a catalog maintenance, an inventory check, etc.], and the operating effective action which should be done now [such as a spring-and-summer show attendance-and-absence check,] are contained in this large box 61.

[0051] A business manager can check what should be done as doing business by seeing such a list display. And if a business manager doubles and clicks a mouse cursor in arbitrary items, while the selected doing business will be registered as a visit purpose, it is displayed in the upper small box 62.

[0052] Thus, the visit plan drawn up by easy work can be outputted from the printing section 9 as a week activity plan document. Moreover, the information on the above-mentioned visit plan is inputted into the personal digital assistant which is not illustrated, and visit activities can be carried out, checking this on the spot.

[0053] Moreover, it sets in other operation gestalten for inputting doing business performed according to a day. If the mouse click of the date on the 4th currently displayed in the date selection area 42 is carried out in the month-long visit schedule / actual result input screen of above-mentioned drawing 5 when it is going to form the visit plan on September 4 of the "Nagashima performance" After the date is buried by number-of-times viewing-area of visit 41a according to the animation effect, the screen of a notebook like drawing 7 appears.

[0054] Page turning over has come to be able to do the ear 71 of a page simply by carrying out a mouse click in drawing 7. Drawing 7 shows the page [1st] screen and has the display column 72 of the operating effective act performed for campaign etc., the display column 73 of the operating basic act which should be carried out periodically, and the operating status display column 74 that displays a comment etc. Moreover, drawing 8 shows the page [2nd] screen and has the guide display column 81 showing the outline of a business talk process, and the same operating status display column 74 as the 1st page.

[0055] With this operation form, various operating activities are divided into a operating effective act, a operating basic act, and an individual concrete business talk process, and it is made to perform a status control so that clearly from these drawing 7 and drawing 8. Specifically, the status-control section 6 arranges in three categories which mentioned above various doing business registered by the planned creation section 4, and is performing the status control. And three categories are divided like drawing 7 and drawing 8, and it is made to display on a display 8 through the display-control section 7.

[0056] Here, a operating effective act is doing business represented by campaign etc., and the thing of doing business carried out as the schedule set up by the side which does business is said. Moreover, a operating basic act means fundamental doing business by which it is made desirable to carry out repeatedly in a specific cycle. Moreover, although the business talk process arranged in purpose-oriented a series of doing business followed until

it result d [from preparation of a business talk] in an order received, it says things.

[0057] Thus, while arranging separately the operating effective act and the operating basic act that properties differ in various operating activities, and a business talk process, respectively and being made to perform a status control, it is made to express also to a display 8 as this operation form separately. Therefore, a business manager can know now immediately the act which should be now done from various viewpoints, and can draw up the plan of operating activities more exactly.

[0058] Below, it explains concretely. First, only the act which became the operation timing within the period on September 1 to September 8 among the various operating effective acts which the manager memorized in the progress data-storage section 25 classified by customer beforehand using the planned creation section 4 is displayed on the operating effective act display column 72 of drawing 7.

[0059] Based on the information on the various operating effective actions memorized by the planned creation section 4 of drawing 1 by the progress data-storage section 25 classified by customer, and the operation scheduled day of those, the status-control section 6 performs a status control, and this is performing it by displaying on a display 8 only the operating effective action which became operation timing through the display-control section 7.

[0060] About the spring-and-summer new work show, about target challenge campaign, in the example of drawing 7, the operating effective action of an "attendance-and-absence check" is displayed on the operating effective action display column 72 noting that two operating effective actions, "a join lucky notice and gratitude", and "comment inquiry of campaign", become the operation timing within the period on September 1 to September 8, respectively.

[0061] Moreover, only the action from which the manager became the operation timing within the period on September 1 to September 8 among the various operating basic actions beforehand memorized in the progress data-storage section 25 classified by customer using the planned creation section 4 is displayed like [the operating basic action display column 73] the above-mentioned operating effective action display column 72. In the example of drawing 7, it is displayed noting that two operating basic actions, a catalog maintenance and a shop front inventory check, become operation timing.

[0062] The following processings have realized this. Namely, the information on the various operating basic actions which the manager created beforehand by the planned creation section 4, and those optimal operation cycles, and the information on the last enforcing date registered by the actual result registration section 5 are memorized for every action by the progress data-storage section 25 classified by customer of drawing 1. The status-control section 6 performs a status control based on these information. And only the operating basic action that it is better to carry out within the period on September 1 to September 8 is taken out, and it is made to display it on a display 8 through the display-control section 7.

[0063] Thus, a manager displays only the action which became the timing which should be carried out among various doing business beforehand registered as an operating-activities plan (operation plan of business), and is made to tell a business manager with this operation gestalt.

[0064] Therefore, whenever support organizations, such as a manager, perform the above information registration beforehand on the personal computer which each business manager uses, the business manager using the personal computer can know optimal following way, in order to raise operating productivity. That is, in order that a very ordinary business manager may also perform the high operating activities of productivity, which customer comes to know timely what should be carried out to which timing.

[0065] What is necessary is just to click one or two actions or more with a mouse 23 out of various doing business currently displayed on the above-mentioned operating effective action display column 72 or the operating basic action display column 73, in order to register doing business which a business manager actually performs about "the Nagashima performance" on September 4.

[0066] In addition, although it is made to perform all of the registration processing of doing business which a business manager actually performs in the example described above using the same planned creation section 4 based on processing of the information registration which a manager performs beforehand, and its registered information You may register beforehand into the personal computer with which a business manager uses the data of the operating plan drawn up in the planned creation section 4 in the personal computer which the manager is using through the network which is not illustrated.

[0067] Moreover, a list indication of the concrete alphabetic information which was inputted into the operating status display column 74 of drawing 7 by the keyboard 22 at the time of a report as a result of operating activities, or was inputted into it by the personal digital assistant which is not illustrated on the spot is given. A business manager can change a future activity plan with reference to the information on this past, and can also do additional registration of it.

[0068] Operation is very easy, by pushing the list button 75, displays all other doing business (doing business which is not operation timing is included) that is not displayed now, and should just carry out the mouse click of the desired item out of it.

[0069] Moreover, as mentioned above, the planned creation section 5 also performs creation of a business talk process. The planned creation section 5 of this operation gestalt enables it to create the optimal business talk process simply on a personal computer in order to raise operating productivity. Creation of a business talk process is performed based on the screen of drawing 8. The screen shown in this drawing 8 arranges and displays the information for every individual business talk with a customer, and the guideline until it leads the business talk to an order received is shown in the guide display column 81.

[0070] Since a business talk is what is fundamentally carried out according to a partner's situation, even if it creates a schedule strictly from the beginning, it is not necessarily becoming just like that. Therefore, what put only the effective action used as a key in order is displayed on this guide display column 81. The effective action used as this key is also beforehand memorized by the manager at the progress data-storage section 25 classified by customer.

[0071] Moreover, it is inputted into the operating status display column 74 of drawing 8 besides the information in the past that it is explained by drawing 7, with another personal computer which other business managers and managers use, and the concrete alphabetic information (the 3rd step of comment) about business talk progress of the advice sent through the network which is not illustrated is also displayed on it.

[0072] A business manager can add or change the action performed as a business talk process with reference to alphabetic information, such as this advice. That is, since the additional input screen of doing business will appear if the button 82 of arrangement — and others is pushed, the additional input of the doing business which is not in a guideline there can be carried out. Thus, with this operation gestalt, the notebook according to customer is opened, and concrete strategy can be stood interactively, looking at various data.

[0073] In addition, in the month-long visit schedule / actual result input screen which showed it to drawing 5 in order to enable it to grasp easily such how many business talk processes were planned, it is possible to add further the area which displays the business talk number of cases.

[0074] If it does in this way, a business manager by seeing this business talk number of cases, the number of **s of the white showing the number-of-times desired value of a visit, and the sum total of the date of the customer name by which it was indicated by classification by color, and a visit schedule / actual result, and the visit number of cases It can judge from two viewpoints ["visit / where / in order to perform the visit activities with sufficient balance / it"] "where it should visit in order to manage the business talk currently held now." Consequently, the customer who should visit while looking at the whole balance can be judged exactly, and the battle visit force can be distributed now.

[0075] Moreover, in drawing 8, if the end button 83 is pushed and the screen of this notebook is closed, next, a screen like drawing 9 will appear. With this operation form, the data of the tool for which the data of various doing business are not only memorized by the progress data-storage section 25 classified by customer, but are needed in operation of the doing business are memorized by the tool database storage section 27.

[0076] And on the screen of drawing 9, in case planned doing business is carried out, a list indication of the required tool is given. A tool required for operation of the doing business can be packed by this, and it can be made to output from the printing section 9. since it is put into a customer's addressing name, a person-in-charge name, etc. by the tool in that case — ON — a RIYU tool can be directed

[0077] In addition, customer evaluation / classification section 2, the desired value setting section 3, the planned creation section 4, the actual result registration section 5, the status-control section 6, and the display-control section 7 of drawing 1 explained above are constituted by CPU, ROM, RAM, etc. which are built in the main part 1 of a personal computer shown in drawing 2 and which are not illustrated.

[0078]

[Effect of the Invention] As this invention was mentioned above, it is based on each data of the activity result registered by the operating-activities plan and the above-mentioned actual result registration means which were created by the above-mentioned planned creation means. The operating basic action of repeating and carrying out progress of operating activities in a predetermined cycle, Since a status-control means to have divided into three kinds of business talk processes which put in order the operating effective action carried out as the schedule set up beforehand and a series of doing business in a business talk, and to manage was established Progress of operating activities can be exactly grasped from three kinds of viewpoints of the operating effective action and the operating basic action that properties differ in various operating activities, and a business talk process, and in order that a business manager may raise operating productivity, the plan of the optimal operating activities can be drawn up more easily.

[0079] Moreover, in case a business manager's operating-activities plan is drawn up according to other features of this invention Since a display-control means to control to divide and display the operation plan of the above-mentioned operating basic action, the above-mentioned operating effective action, and the above-mentioned business talk process on the screen for registering each doing business performed according to a day was established In case the business manager who forms an operating-activities plan registers each doing business performed according to the above-mentioned day, in order that he can arrange and understand the action which should be done now from the three above-mentioned kinds of viewpoints and may raise operating productivity, the plan of the optimal operating activities can be drawn up more easily.

[0080] Moreover, the inside of various doing business which was beforehand created as an operation plan of operating activities according to the feature of others of this invention, Since it was made to display on the registration screen of each doing business which performs only the action which became the timing which should be carried out based on the above-mentioned operation plan according to a day, the business manager who looked at the registration screen In order to be able to check timely the optimal doing business which should be carried out day by day and to perform the high operating activities of productivity, he can understand exactly what should be carried out to which timing.

[0081] By the above thing, according to this invention, the optimal standardization of operating activities can be attained and operating productivity can be raised innovatively.

[Translation done.]

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TECHNICAL FIELD

[The technical field to which invention belongs] Especially this invention uses performing efficiently the operating activities which a business manager performs about the improvement support system in operating productivity for the system for supporting, and is suitable.

[Translation done.]

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PRIOR ART

[Description of the Prior Art] Generally, since operating activities were that human being carries out to human being, the standardization or systematization was conventionally difficult. For this reason, while computerization progressed in fields, such as sales management, and manufacture management or organization management, many business managers were performing operating activities, depending on experience and intuition.

[0003] While a commercial scene goes into a low-growth time and competition intensifies increasingly on the other hand, corporate management is improved and enabling it to raise many profits for management property, such as the fewest possible time, a man, and a facility, is noted increasingly. Thus, in order to raise the productivity of business, it is necessary to perform operating activities by the suitable method.

[Translation done.]

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EFFECT OF THE INVENTION

[Effect of the Invention] this invention is the operating-activities plan and the above-mentioned actual result registration means which were created by the above-mentioned planned creation means as mentioned above. The operating basic act of repeating and carrying out progress of operating activities in a predetermined cycle based on each data of the registered activity result. Since a status-control means to have divided into three kinds of business talk processes which put in order the operating effective act carried out as the schedule set up beforehand and a series of doing business in a business talk, and to manage was established Progress of operating activities can be exactly grasped from three kinds of viewpoints of the operating effective act and the operating basic act that properties differ in various operating activities, and a business talk process, and in order that a business manager may raise operating productivity, the plan of the optimal operating activities can be drawn up more easily.

[0079] Moreover, in case a business manager's operating-activities plan is drawn up according to other features of this invention Since a display-control means to control to divide and display the operation plan of the above-mentioned operating basic act, the above-mentioned operating effective act, and the above-mentioned business talk process on the screen for registering each doing business performed according to a day was established In case the business manager who forms an operating-activities plan registers each doing business performed according to the above-mentioned day, in order that he can arrange and understand the act which should be done now from the three above-mentioned kinds of viewpoints and may raise operating productivity. The plan of the optimal operating activities can be more easily drawn up now.

[0080] since it made display on the registration screen of each doing business which performs only the act which became the timing which should be carried out based on the above-mentioned operation plan among various doing business beforehand created as an operation plan of operating activities according to a day according to the feature of others of this invention, in order [moreover,] the business manager who looked at the registration screen can check timely the optimal doing business which should carry out day by day and to perform the high operating activities of productivity He can understand now exactly what should be carried out to which timing.

[0081] By the above thing, according to this invention, the optimal standardization of operating activities can be attained and operating productivity can be raised innovatively.

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TECHNICAL PROBLEM

[Problem(s) to be Solved by the Invention] However, since the method of operating activities had become dependent on the business manager in almost all companies, a business manager's belief, a result, etc. had produced unevenness and futility in operating activities. As for the business manager who improved the actual result and has been said to be excellent in it, it was actual to have devised personally and to have found out the optimal operating method by one's force.

[0005] However, as for a business manager excellent in a company, only a mere handful exists. Therefore, in order to essentially raise operating productivity innovatively as a company, it is necessary to improve the so-called content of activity of standard business managers other than an excellent business manager.

[0006] Moreover, a business manager's effort came to be somewhat mitigated with the spread of the personal computers in recent years by using a personal computer for having done the work of having entered an activity plan in the week activity plan document drawn up with the word processor etc. in handwriting conventionally, having totaled the result, and harnessing in a degree.

[0007] However, the application software of the personal computer which the business manager is using is word-processing software, a spreadsheet or a database, etc. at most, and, moreover, the usage is left to each one of discretion. Now, the personal computer was only used as a tool of mere paperwork, and moreover, since many efforts were required in order to use the multi-functionalized application software, complicated and supporting improvement in operating productivity were not completed at all.

[0008] this invention is accomplished in view of such the actual condition, attains the optimal standardization of operating activities, and aims at enabling it to raise operating productivity innovatively.

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MEANS

[Means for Solving the Problem] While the improvement support system in operating productivity of this invention draws up the operating-activities plan for various customers A planned [to be an improvement support system in operating productivity for managing the progress, and draw up the operating-activities plan for the above-mentioned various customers] creation means, An actual result registration means to register the actual activity result based on the operating-activities plan drawn up by the above-mentioned planned creation means, It is based on each data of the activity result registered by the operating-activities plan and the above-mentioned actual result registration means which were created by the above-mentioned planned creation means. The operating basic action of repeating and carrying out progress of operating activities in a predetermined cycle, It is characterized by having a status-control means to divide into three kinds of business talk processes which put in order the operating effective action carried out as the schedule set up beforehand, and a series of doing business in a business talk, and to manage.

[0010] The place by which it is characterized [of this invention / other] the above-mentioned planned creation means While creating the operation plan of the above-mentioned operating basic act, the above-mentioned operating effective act, and the above-mentioned business talk process Do to draw up the above-mentioned operating-activities plan by registering each doing business performed according to a day based on the above-mentioned operation plan. It is characterized by having a display-control means to control to divide and display the operation plan of the above-mentioned operating basic act, the above-mentioned operating effective act, and the above-mentioned business talk process on the screen for registering each doing business performed according to the above-mentioned day.

[0011] The place by which it is characterized [of others of this invention] the above-mentioned status-control means It is based on each data of the activity result registered by the operation plan of various operating basic acts and the above-mentioned actual result registration means which were created by the above-mentioned planned creation means. It manages whether when having registered each doing business performed according to the above-mentioned day, the above-mentioned various operating basic acts occur within the operation period based on the above-mentioned predetermined cycle. the above-mentioned display-control means It is characterized by controlling to display on the screen for registering each doing business which performs only the operating basic act done to it being within the operation period based on the above-mentioned predetermined cycle by the above-mentioned status-control means according to the above-mentioned day.

[0012] The place by which it is characterized [of others of this invention] the above-mentioned status-control means It is based on each data of the activity result registered by the operation plan of various operating effective acts and the above-mentioned actual result registration means which were created by the above-mentioned planned creation means. It manages whether it is within the operation period based on the schedule in which the above-mentioned various operating effective acts carried out [above-mentioned] a setup when having registered each doing business performed according to the above-mentioned day. the above-mentioned display-control means It is characterized by controlling to display on the screen for registering each doing business which performs only the operating effective act done to it being within the operation period based on the schedule which carried out [above-mentioned] a setup by the above-mentioned status-control means according to the above-mentioned day.

[0013] The place by which it is characterized [of others of this invention] the above-mentioned status-control means The operation plan of the various operating basic acts created by the above-mentioned planned creation means and various operating effective acts, It is based on each data with the activity result registered by the above-mentioned actual result registration means. [whether when having registered each doing business performed according to the above-mentioned day, the above-mentioned various operating basic acts occur within the operation period based on the above-mentioned predetermined cycle and] It manages whether it is within the operation period based on the schedule in which the above-mentioned various operating effective acts carried out [above-mentioned] a setup when having registered each doing business performed according to the above-mentioned day. and the above-mentioned display-control means By the above-mentioned status-control means It is characterized by controlling to display on the screen for registering each doing business which performs only the operating effective act done to it being within the operation period based on the operating basic act done to it being within the operation period based on the above-mentioned predetermined cycle, and the schedule which carried out [above-mentioned] a setup according to the above-mentioned day.

[0014] While drawing up the operating-activities plan for various customers, the place by which it is characterized [of others of this invention] Are an improvement support system in operating productivity for managing the

progress, and the operating-activities plan for the above-mentioned various customers. A plan created by registering each doing business performed according to a day based on the operation plan while creating the operation plan of the business containing various doing business] creation means. The inside of various doing business contained in the operation plan of the business created by the above-mentioned planned creation means. It is characterized by having a display-control means to control to display on the screen for registering each doing business which performs only the action which became the timing which should be carried out based on the above-mentioned operation plan according to the above-mentioned day.

[0015] Since this invention consists of the above-mentioned technical means, in various operating activities, the operating effective action and the operating basic action that properties differ, and a business talk process arranged separately, respectively, a status control comes to be carried out, and it becomes possible to grasp progress of operating activities exactly from the three above-mentioned kinds of viewpoints.

[0016] Moreover, since the operating basic action and the operating effective action by which the status control is carried out as mentioned above separately, and a business talk process divide into the registration screen of doing business performed according to a day and it comes to be displayed on it according to other features of this invention, the business manager who forms an operating-activities plan becomes that it is possible to arrange and understand the action which should be done now from the three above-mentioned kinds of viewpoints, in case each doing business which performs according to the above-mentioned day registers.

[0017] Moreover, the inside of the various operating basic actions which were beforehand created as an operation plan of operating activities according to the feature of others of this invention, or various operating effective actions, Since only the action which became the timing which should be carried out based on the above-mentioned operation plan comes to be displayed on the registration screen of each doing business performed according to a day, the business manager who looked at the registration screen becomes possible [checking to timely the optimal doing business which should be carried out day by day].

[0018]

[Embodiments of the Invention] Below, 1 operation gestalt of the improvement support system in operating productivity by this invention is explained based on a drawing. Drawing 1 is the functional block diagram showing the element-feature of the improvement support system in operating productivity by this operation gestalt. Moreover, drawing 2 is drawing showing the hardware composition for carrying out concretely each functional block shown in drawing 1.

[0019] As shown in drawing 2, the improvement support system in operating productivity of this operation gestalt is realized by the personal computer system which has generally spread. That is, as for a keyboard and 23, in this drawing, the main part of a personal computer with which 21 built in CPU, ROM, RAM, etc., and 22 are [a mouse and 24] display units. Although illustration has not been carried out, it is possible for two or more main parts 21 of a personal computer to be connected through a network, and for it to be made to exchange data mutually.

[0020] 25 is the status-control data-storage section classified by customer, and the progress data according to customer based on the content of a plan of the operating activities inputted by support organizations, such as a visit plan inputted by the business manager, and a visit result or a manager, etc. are memorized. 26 is the dealings actual result data-storage section, and the data about a dealings actual result with a customer are memorized.

[0021] 27 is the tool database storage section, and in operation of operating activities, the data of required various tools match it with each doing business which constitutes the above-mentioned operating activities, and it is memorized. As the above-mentioned various tools, the interest attachment tool to a customer, a reaction inquiry tool, the interest attachment status-control sheet classified by customer, a business chance information gathering tool, a key man evaluation tool, etc. can be mentioned, for example.

[0022] 28 is the required tool creation section, actually creates the tool chosen from various kinds of tools memorized by the above-mentioned tool database storage section 27, and consists of printers for printing the documents addressed to a customer for example, etc.

[0023] In addition, the status-control data-storage section 25 classified by customer, the above-mentioned dealings actual result data-storage storage section 26, and the above-mentioned tool database storage section 27 are constituted by storages, such as a hard disk and a floppy disk. When it consists of hard disks, it may be built in the main part 21 of a personal computer. Moreover, when it consists of floppy disks, it is also possible to use it at the gestalt terminal which does not illustrate the floppy disk.

[0024] A business manager draws up a operating plan using the personal computer system of such composition, carries out the plan, and carries out operating activities by evaluating an execution result. Thereby, to the former depending on experience of a business manager or intuition, with this operation gestalt, standardization of operating activities can be attained and operating productivity can be raised so that it may explain below.

[0025] Next, in drawing 1, 1 is the data input section and is constituted by the keyboard 22 and mouse 23 which were shown in drawing 2. 2 is customer evaluation / classification section, and evaluates and classifies various customers under a fixed error criterion. Hereafter, the method of this customer evaluation is explained based on drawing 3 shown below.

[0026] This operation gestalt is estimating the customer from two sides of purchasing power evaluation and dealings evaluation so that clearly from drawing 3. As evaluation criteria of the purchasing power evaluation which evaluates a customer's purchasing power objective, there are annual sales, a manager's motivation, possibilities, a situation, a rate of sales extension, etc., and these items are grasped as a thing in consideration of the potential (capacity) of a partner company (customer), for example.

[0027] Moreover, as evaluation criteria of the dealings evaluation which evaluates a dealings situation with its company, there are annual dealings, a rate of a gross income, a pulse duty factor, reciprocal conditions, etc., and these items are grasped as a thing in consideration of the position of a self-company, for example.

[0028] Moreover, customer evaluation / classification section 2 of this operation greatly divides the customer into four classifications based on the evaluation performed as mentioned above. That is, as shown in drawing 3 (a), according to the height of each evaluation, the customer is divided [the result of purchasing power evaluation] into four classifications, a development visitor, an expansion visitor, a maintenance visitor, and a result visitor, for the result of dealings evaluation for the horizontal axis for the vertical axis.

[0029] Here, each of results of purchasing power evaluation and results of dealings evaluation is high customers, and a development visitor means the customer who moreover has possibilities at a good customer. Moreover, although the result of dealings evaluation is low, the result of purchasing power evaluation is a high customer, and an expansion visitor will mean a customer's thing which dealings may expand further, if a certain improvement is added to operating activities.

[0030] Moreover, although the result of dealings evaluation is high, the result of purchasing power evaluation is a low customer, and although a maintenance visitor is a good customer, he means the customer who lacks in possibilities. Furthermore, each of results of purchasing power evaluation and results of dealings evaluation is low customers, and a result visitor means a customer without possibilities.

[0031] With this operation form, if two or more kinds of the numeric values and the contents which should be inputted to each item of purchasing power evaluation and dealings evaluation are beforehand registered into the system and a manager chooses one from the inside with a mouse 23, the selected contents will be automatically transposed to the evaluating point of five-point full marks by customer evaluation / classification section 2. And the evaluating point for each [these] evaluation criteria of every is totaled automatically, and each customer is divided into four classifications when the total result is plotted by the system of coordinates shown in drawing 3 (b).

[0032] It returns and explains to drawing 1 again. 3 is the desired value setting section and sets up the desired value of the number of times of a month-long visit according to customer. That is, a business manager inputs the desired value of the optimal number of times of the month-long visit classified by customer using the data input section 1, in order to realize the dealings budget numeric value defined according to the dealings actual result of the past memorized by the dealings actual result database storage section 26 based on the result of the evaluation and the classification by the above-mentioned customer evaluation / classification section 2.

[0033] Here, a business manager can distribute now to the customer who wants to carry out dealings expansion of the operating visit force proper by setting up desired value so that the number of times of a visit may increase to the clarified customer who wants to carry out dealings expansion by the evaluation and the classification by the above managers. In addition, in order to raise operating productivity efficiently, it is desirable to distribute many operating force in order of a development visitor, an expansion visitor, a maintenance visitor, and a result visitor.

[0034] In addition, since the result of the evaluation and the classification by the above-mentioned customer evaluation / classification section 2 is reflected by being displayed in the setting screen of the desired value which is not illustrated by different color for every classification to which a customer name belongs, a business manager can understand at a glance to which customer many number of times of a visit should be set up.

[0035] By the way, conventionally, although sales management data existed, this sales management data was what performs only dealings evaluation from the position of a self-company chiefly. On the other hand, with this operation form, purchasing power evaluation is also performed like drawing 3, a customer's potential is also taken into consideration and evaluation and the classification are performed. Thereby, a customer can be evaluated more to accuracy and a business manager can distribute now to the customer who wants to carry out dealings expansion of the limited operating visit force proper.

[0036] Through the status-control section 6, the desired value of the number of times of the month-long visit classified by customer set up by the above-mentioned desired value setting section 3 is given to the status-control data-storage section 26 classified by customer, and is memorized. Moreover, the desired value of the above-mentioned number of times of the month-long visit classified by customer memorized by the status-control data-storage section 26 classified by customer is given to the display-control section 7 through the status-control section 6; and is displayed on a display 8 according to a predetermined form under control by this display-control section 7.

[0037] Drawing 4 is drawing showing an example of the screen displayed on the above-mentioned display 8, and shows the month-long visit schedule / actual result input screen for business managers. The customer name which the business manager is taking charge of is classified by color in the turn that many a development visitor, an expansion visitor, maintenance visitors, result visitors, and operating force should be distributed, and it is expressed as this screen by list. Thus, with this operation form, creativity is put so that a more important customer may jump in to an eye effectively sequentially from a top.

[0038] Moreover, the desired value of the number of times of a visit set up in the desired value setting section 3 as mentioned above is reflected and displayed on the schedule / actual result display area 41 in drawing 4. That is, in above-mentioned schedule / actual result display area 41, unevenness of field 41a enclosed with the thick line expresses the desired value of the number of times of a visit (this field is hereafter called number-of-times viewing area of a visit). That is, the number of **s (in fact, the background color of a schedule / actual result display area 41 is gray, and ** in number-of-times viewing-area of visit 41a is distinguished by being white and being displayed) in this field 41a corresponds to the desired value of the number of times of a visit.

[0039] Again, in drawing 1, 4 is the planned creation section and draws up a business manager's operating-activities plan (a business talk process is included) based on the data into which the business manager and the manager operated and inputted the data input section 1. At this time, a manager registers the operation plan of various operating activities. Moreover, a business manager registers each doing business performed on the above-mentioned visit scheduled day based on the above-mentioned operation plan while inputting the visit scheduled day. Moreover, 5 is the actual result registration section, and when a business manager actually performs the planned operating activities, it registers the visit result as an actual result.

[0040] Although drawing 4 and drawing 5 are drawings showing the example of the month-long visit schedule / actual result input screen for business managers, after performing an actual result input, in order to perform a schedule input, with this operation form, the screen of actual result input mode like drawing 4 appears first. In addition, the change to schedule input mode is performed by pushing a schedule / actual result change button 43.

[0041] In drawing 4 and drawing 5, the number in white ** in number-of-times viewing-area of visit 41a expresses the visit scheduled day and the visit enforcing date. The visit scheduled day is expressed with a blue number, and it is made to express a visit enforcing date with a red number here. In addition, the date of a red display is expressed with the usual number on account of a drawing, and the date of a blue display is expressed with the number with O. Thus, with this operation form, since it is made to display the date of a visit schedule, and the date of visit implementation by different color, both are distinguishable at a glance.

[0042] Moreover, the portion shown with the slash in the above-mentioned number-of-times viewing-area of visit 41a is a field currently displayed in yellow in fact. This field has few days which it actually visited to the number of times desired value of a month-long visit shown by the number of **, and it is displayed in order to give warning, when the degree of progress is low, and it shows the customer who should visit to top priority at present, and its number of times. Therefore, the field of this yellow display increases, so that it goes to the end of the month.

[0043] In case the actual result which it visited is inputted, the work of burying a visit enforcing date is done on each ** in number-of-times viewing-area of visit 41a shown in drawing 4. As operation, a mouse cursor is placed on the date which carried out the visit in the date selection area 42, and mouse button is clicked. thereby, as the selected date runs to a schedule / actual result display area 41 according to the animation effect, it moves automatically, and the red number is buried in an order from the head by each ** in visit time numeral field 41a.

[0044] If all white **s about a certain customer in the above-mentioned number-of-times viewing-area of visit 41a are buried with a red number at this time, it will mean attaining a target about the customer. When a target is attained, it is made to tell that the target was attained with this operation gestalt by taking out a sound effect from the loudspeaker which is not illustrated, or displaying a message on a display 8.

[0045] Moreover, in case a visit plan is inputted, first, a schedule / actual result change button 43 is pushed, and schedule input mode is chosen. Then, it changes from the screen of drawing 4 to the screen of drawing 5, and the date in the date selection area 42 changes to a schedule input. At this time, the number currently displayed in red in actual result input mode till then is blue, and comes to be displayed. Moreover, the area of ** of the yellow in the above-mentioned number-of-times viewing-area of visit 41a also changes.

[0046] Next, the visit plan is drawn up by carrying out the mouse click of the date in the date selection area 42, and inputting the visit scheduled day the same with having inputted the visit enforcing date. In this way, an input of the date of a visit schedule displays the sum total of the visit number of cases for with [every] a day on the visit number-of-cases area 44. Thereby, as compared with the average visit number of cases per [which a business manager can visit] day, it can check whether it is realizable.

[0047] In addition, at drawing 4 and drawing 5, although the month-long visit schedule / actual result input screen about the existing customer are shown, even if there are not the customer from whom the visit purpose differs greatly, for example, a new exploitation customer, and direct dealings, about the information source which offers various information, similarly, they switch a screen and can operate it with this operation gestalt. The situation of a visit schedule of these whole various customers is displayed by the bar graph 45 down the screen.

[0048] Thus, with this operation gestalt, in case a visit plan is drawn up, by seeing the number of white **s in number-of-times viewing-area of visit 41a, the number-of-times desired value of a month-long visit can be checked easily, and the consciousness of distributing more visit schedules to a customer with many white **s can be worked. Moreover, to the customer to whom warning of a yellow display is carried out, the consciousness of setting up a visit schedule by top priority can also be worked. For this reason, the formulation of a visit plan and the check of an actual result which always took into consideration achievement of the number-of-times desired value of a visit can be performed now.

[0049] A business manager draws up an operating-activities plan by inputting into the planned creation section 5 the data for the purpose of [the] a visit (doing business) other than the visit scheduled day mentioned above. For example, if the mouse click of the date on the 5th currently displayed in the date selection area 42 is carried out when forming the visit plan on September 5 of "Nakamura" in the month-long visit schedule / actual result input screen of drawing 5, after the date is buried by number-of-times viewing-area of visit 41a according to the animation effect, a screen like drawing 6 will appear.

[0050] In the screen shown in drawing 6, a list indication of the effective action (operating plan) which should be done as business which the manager memorized beforehand in the progress data-storage section 25 classified by customer using the planned creation section 4 is given in the downward large box 61. The operating basic action which should be carried out periodically [a catalog maintenance, an inventory check, etc.], and the operating effective action which should be done now [such as a spring-and-summer show attendance-and-absence check,]

are contained in this large box 61.

[0051] A business manager can check what should be done as doing business by seeing such a list display. And if a business manager doubles and clicks a mouse cursor in arbitrary items, while the selected doing business will be registered as a visit purpose, it is displayed in the upper small box 62.

[0052] Thus, the visit plan drawn up by easy work can be outputted from the printing section 9 as a week activity plan document. Moreover, the information on the above-mentioned visit plan is inputted into the personal digital assistant which is not illustrated, and visit activities can be carried out, checking this on the spot.

[0053] Moreover, it sets in other operation gestalten for inputting doing business performed according to a day. If the mouse click of the date on the 4th currently displayed in the date selection area 42 is carried out in the month-long visit schedule / actual result input screen of above-mentioned drawing 5 when it is going to form the visit plan on September 4 of the "Nagashima performance" After the date is buried by number-of-times viewing-area of visit 41a according to the animation effect, the screen of a notebook like drawing 7 appears.

[0054] Page turning over has come to be able to do the ear 71 of a page simply by carrying out a mouse click in drawing 7. Drawing 7 shows the page [1st] screen and has the display column 72 of the operating effective action performed for campaign etc., the display column 73 of the operating basic action which should be carried out periodically, and the operating status display column 74 that displays a comment etc. Moreover, drawing 8 shows the page [2nd] screen and has the guide display column 81 showing the outline of a business talk process, and the same operating status display column 74 as the 1st page.

[0055] With this operation gestalt, various operating activities are divided into a operating effective action, a operating basic action, and an individual concrete business talk process, and it is made to perform a status control so that clearly from these drawing 7 and drawing 8. Specifically, the status-control section 6 arranges in three categories which mentioned above various doing business registered by the planned creation section 4, and is performing the status control. And three categories are divided like drawing 7 and drawing 8, and it is made to display on a display 8 through the display-control section 7.

[0056] Here, a operating effective act is doing business represented by campaign etc., and the thing of doing business carried out as the schedule set up by the side which does business is said. Moreover, a operating basic act means fundamental doing business by which it is made desirable to carry out repeatedly in a specific cycle. Moreover, although the business talk process arranged in purpose-oriented a series of doing business followed until it resulted [from preparation of a business talk] in an order received, it says things.

[0057] Thus, while arranging separately the operating effective action and the operating basic action that properties differ in various operating activities, and a business talk process, respectively and being made to perform a status control, it is made to express also to a display 8 as this operation gestalt separately. Therefore, a business manager can know now immediately the action which should be now done from various viewpoints, and can draw up the plan of operating activities more exactly.

[0058] Below, it explains concretely. First, only the action which became the operation timing within the period on September 1 to September 8 among the various operating effective actions which the manager memorized in the progress data-storage section 25 classified by customer beforehand using the planned creation section 4 is displayed on the operating effective action display column 72 of drawing 7.

[0059] Based on the information on the various operating effective actions memorized by the planned creation section 4 of drawing 1 by the progress data-storage section 25 classified by customer, and the operation scheduled day of those, the status-control section 6 performs a status control, and this is performing it by displaying on a display 8 only the operating effective action which became operation timing through the display-control section 7.

[0060] About the spring-and-summer new work show, about target challenge campaign, in the example of drawing 7, the operating effective action of an "attendance-and-absence check" is displayed on the operating effective action display column 72 noting that two operating effective actions, "a join lucky notice and gratitude", and "comment inquiry of campaign", become the operation timing within the period on September 1 to September 8, respectively.

[0061] Moreover, only the action from which the manager became the operation timing within the period on September 1 to September 8 among the various operating basic actions beforehand memorized in the progress data-storage section 25 classified by customer using the planned creation section 4 is displayed like [the operating basic action display column 73] the above-mentioned operating effective action display column 72. In the example of drawing 7, it is displayed noting that two operating basic actions, a catalog maintenance and a shop front inventory check, become operation timing.

[0062] The following processings have realized this. Namely, the information on the various operating basic actions which the manager created beforehand by the planned creation section 4, and those optimal operation cycles, and the information on the last enforcing date registered by the actual result registration section 5 are memorized for every action by the progress data-storage section 25 classified by customer of drawing 1. The status-control section 6 performs a status control based on these information. And only the operating basic action that it is better to carry out within the period on September 1 to September 8 is taken out, and it is made to display it on a display 8 through the display-control section 7.

[0063] Thus, a manager displays only the action which became the timing which should be carried out among various doing business beforehand registered as an operating-activities plan (operation plan of business), and is made to tell a business manager with this operation gestalt.

[0064] Therefore, whenever support organizations, such as a manager, perform the above information registration

beforehand on the personal computer which each business manager uses, the business manager using the personal computer can know optimal following way, in order to raise operating productivity. That is, in order that a very ordinary business manager may also perform the high operating activities of productivity, which customer comes to know timely what should be carried out to which timing.

[0065] What is necessary is just to click one or two actions or more with a mouse 23 out of various doing business currently displayed on the above-mentioned operating effective action display column 72 or the operating basic action display column 73, in order to register doing business which a business manager actually performs about "the Nagashima performance" on September 4.

[0066] In addition, although it is made to perform all of the registration processing of doing business which a business manager actually performs in the example described above using the same planned creation section 4 based on processing of the information registration which a manager performs beforehand, and its registered information You may register beforehand into the personal computer with which a business manager uses the data of the operating plan drawn up in the planned creation section 4 in the personal computer which the manager is using through the network which is not illustrated.

[0067] Moreover, a list indication of the concrete alphabetic information which was inputted into the operating status display column 74 of drawing 7 by the keyboard 22 at the time of a report as a result of operating activities, or was inputted into it by the personal digital assistant which is not illustrated on the spot is given. A business manager can change a future activity plan with reference to the information on this past, and can also do additional registration of it.

[0068] Operation is very easy, by pushing the list button 75, displays all other doing business (doing business which is not operation timing is included) that is not displayed now, and should just carry out the mouse click of the desired item out of it.

[0069] Moreover, as mentioned above, the planned creation section 5 also performs creation of a business talk process. The planned creation section 5 of this operation form enables it to create the optimal business talk process simply on a personal computer in order to raise operating productivity. Creation of a business talk process is performed based on the screen of drawing 8. The screen shown in this drawing 8 arranges and displays the information for every individual business talk with a customer, and the guideline until it leads the business talk to an order received is shown in the guide display column 81.

[0070] Since a business talk is what is fundamentally carried out according to a partner's situation, even if it creates a schedule strictly from the beginning, it is not necessarily becoming just like that. Therefore, what put only the effective act used as a key in order is displayed on this guide display column 81. The effective act used as this key is also beforehand memorized by the manager at the progress data-storage section 25 classified by customer.

[0071] Moreover, it is inputted into the operating status display column 74 of drawing 8 besides the information on past that it explained by drawing 7, with another personal computer which other business managers and managers use, and the concrete alphabetic information (the 3rd step of comment) about business talk progress of the advice sent through the network which is not illustrated is also displayed on it.

[0072] A business manager can add or change the act performed as a business talk process with reference to alphabetic information, such as this advice. That is, since the additional input screen of doing business will appear if the button 82 of arrangement - and others is pushed, the additional input of the doing business which is not in a guideline there can be carried out. Thus, with this operation form, the notebook according to customer is opened, and concrete strategy can be stood interactively, looking at various data.

[0073] In addition, in the month-long visit schedule / actual result input screen which showed it to drawing 5 in order to enable it to grasp easily such how many business talk processes were planned, it is possible to add further the area which displays the business talk number of cases.

[0074] If it does in this way, a business manager by seeing this business talk number of cases, the number of **s of the white showing the number-of-times desired value of a visit, and the sum total of the date of the customer name by which it was indicated by classification by color, and a visit schedule / actual result, and the visit number of cases It can judge from two viewpoints ["visit / where / in order to perform the visit activities with sufficient balance / it"] "where it should visit in order to manage the business talk currently held now." Consequently, the customer who should visit while looking at the whole balance can be judged exactly, and the battle visit force can be distributed now.

[0075] Moreover, in drawing 8, if the end button 83 is pushed and the screen of this notebook is closed, next, a screen like drawing 9 will appear. With this operation form, the data of the tool for which the data of various doing business are not only memorized by the progress data-storage section 25 classified by customer, but are needed in operation of the doing business are memorized by the tool database storage section 27.

[0076] And on the screen of drawing 9, in case planned doing business is carried out, a list indication of the required tool is given. A tool required for operation of the doing business can be packed by this, and it can be made to output from the printing section 9. since it is put into a customer's addressing name, a person-in-charge name, etc. by the tool in that case — ON — a RIYU tool can be directed

[0077] In addition, customer evaluation / classification section 2, the desired value setting section 3, the planned creation section 4, the actual result registration section 5, the status-control section 6, and the display-control section 7 of drawing 1 explained above are constituted by CPU, ROM, RAM, etc. which are built in the main part 1 of a personal computer shown in drawing 2 and which are not illustrated.

[Translation done.]

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* NOTICES *

Japan Patent Office is not responsible for any damages caused by the use of this translation.

- 1.This document has been translated by computer. So the translation may not reflect the original precisely.
- 2.**** shows the word which can not be translated.
- 3.In the drawings, any words are not translated.

DESCRIPTION OF DRAWINGS

[Brief Description of the Drawings]

[Drawing 1] It is the functional block diagram showing the element-feature of the improvement support system in improving productivity of this invention.

[Drawing 2] It is drawing showing the hardware composition for carrying out concretely each functional block shown in drawing 1.

[Drawing 3] It is drawing for explaining evaluation and classification of the customer by customer evaluation / classification section.

[Drawing 4] It is drawing showing the example of a month-long visit schedule / actual result input screen (actual result input mode).

[Drawing 5] It is drawing showing the example of a month-long visit schedule / actual result input screen (scheduled input mode).

[Drawing 6] It is drawing showing the example of the input screen for the purpose of a visit.

[Drawing 7] It is drawing showing the example of a doing-business schedule / actual result input screen (the 1st page).

[Drawing 8] It is drawing showing the example of a doing-business schedule / actual result input screen (the 2nd page).

[Drawing 9] It is drawing showing the example of the tool list display screen.

[Description of Notations]

- 1 Data Input Section
 - 2 Customer Evaluation / Classification Section
 - 3 Desired Value Setting Section
 - 4 Planned Creation Section
 - 5 Actual Result Registration Section
 - 6 Status-Control Section
 - 7 Display-Control Section
 - 8 Display
 - 9 Printing Section
 - 21 Main Part of Personal Computer
 - 22 Keyboard
 - 23 Mouse
 - 24 Display Unit
 - 25 Status-Control Data-Storage Section Classified by Customer
 - 26 Dealings Actual Result Data-Storage Section
 - 27 Tool Database Storage Section
 - 28 Required Tool Creation Section
-

[Translation done.]

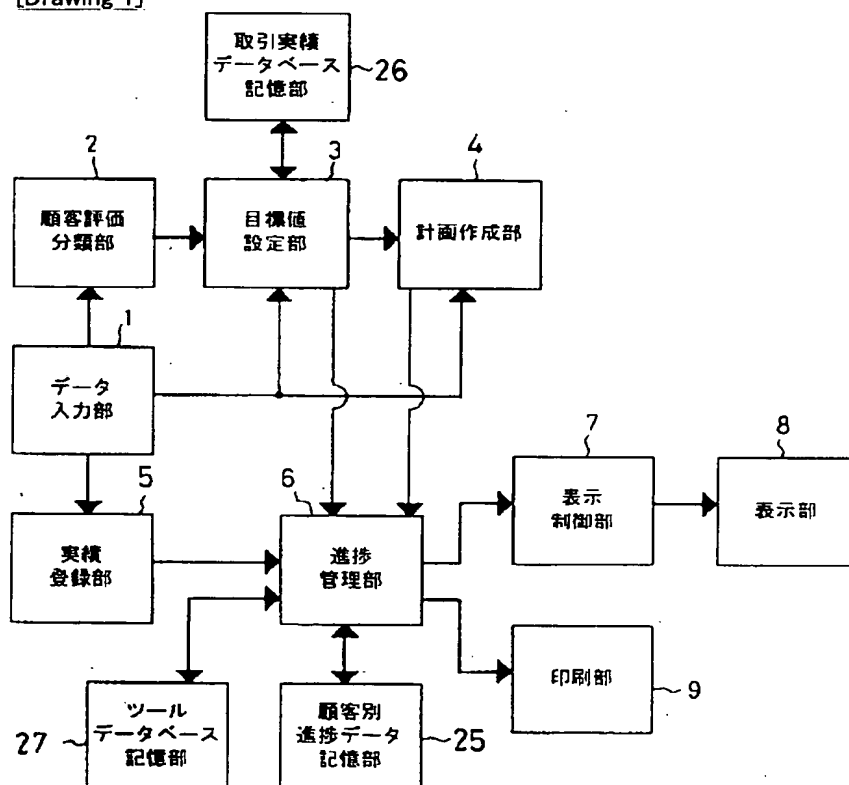
* NOTICES *

Japan Patent Office is not responsible for any damages caused by the use of this translation.

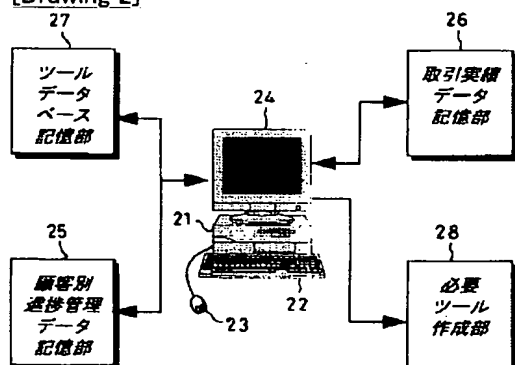
- 1.This document has been translated by computer. So the translation may not reflect the original precisely.
- 2.**** shows the word which can not be translated.
- 3.In the drawings, any words are not translated.

DRAWINGS

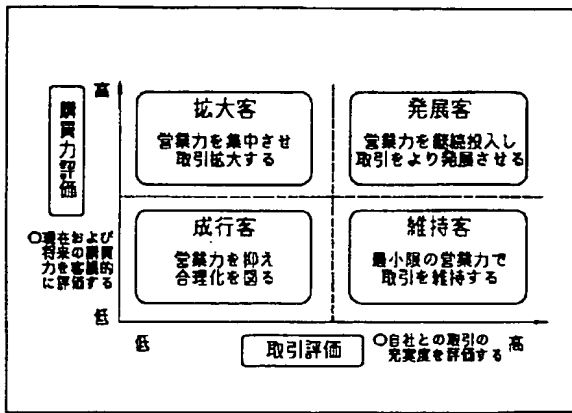
[Drawing 1]



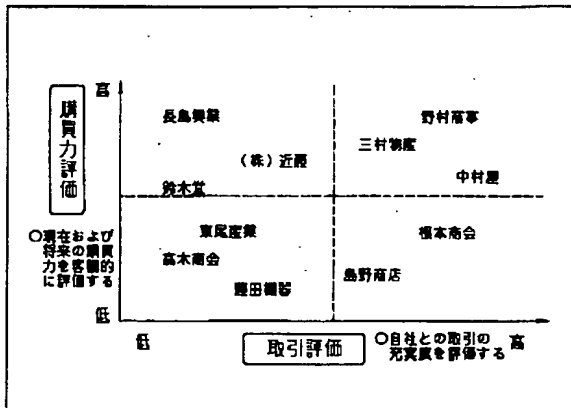
[Drawing 2]



[Drawing 3]



(a)



(b)

[Drawing 4]

月間訪問予定/実績入力

予定印刷 閉じる

9月底上 販売二課 鈴木 一郎 1995年9月18(金)

既存顧客 新規開拓顧客 情報源

顧客分類	顧客名	予定/実績表示										実績入力							情
		1	2	3	4	5	6	7	8	9	10	土	日	月	火	水	金		
販売店	中村屋	21	29									26	27	28	29	30	31	1	情
販売店	野村商	22	23	25								26	27	28	29	30	31	1	情
販売店	三村物	24	30									26	27	28	29	30	31	1	情
販売店	近藤	30										26	27	28	29	30	31	1	情
販売店	鈴木堂	22	24	25								26	27	28	29	30	31	1	情
販売店	長島興	24	25	1								26	27	28	29	30	31	1	情
販売店	島野商	29										26	27	28	29	30	31	1	情
販売店	根本商	28										26	27	28	29	30	31	1	情
販売店	鹿吉	29										26	27	28	29	30	31	1	情
販売店	大下	22										26	27	28	29	30	31	1	情
販売店	岡崎	1										26	27	28	29	30	31	1	情
販売店	大豊	31										26	27	28	29	30	31	1	情

● : 発展 ● : 拡大 ○ : 維持 ○ : 成行

41a 42 44

既存顧客 新規開拓顧客 情報源

訪問件数 0 0 0 0 0 0 0 0

訪問件数 0 0 0 0 0 0 0 0

訪問件数 0 0 0 0 0 0 0 0

合計 0 0 0 0 0 0 0 0

45

[Drawing 5]

月間訪問予定/実績入力

予定印刷 閉じる

9月底日 販売二課 鈴木 一郎 41 1995年9月18(金) 43

既存顧客 新規開拓顧客 情報源

顧客分類	顧客名	予定/実績表示										予定入力							
		1	2	3	4	5	6	7	8	9	10	土	日	月	火	水	木	金	
販売店	中村屋	2	2	2	2	5						2	3	4	5	6	7	8	情
販売店	野村高	2	2	2	2	5						2	3	4	5	6	7	8	情
販売店	三村物	2	4	3	0							2	3	4	5	6	7	8	情
販売店	近藤	3	8	2	4							2	3	4	5	6	7	8	情
販売店	鈴木堂	2	2	2	4	2	5	0				2	3	4	5	6	7	8	情
販売店	長島興	2	4	2	5	1	3					2	3	4	5	6	7	8	情
販売店	島野商	2	9									2	3	4	5	6	7	8	情
販売店	根本商	2	8									2	3	4	5	6	7	8	情
販売店	原吉	2	9									2	3	4	5	6	7	8	情
販売店	大下	2	2									2	3	4	5	6	7	8	情
販売店	岡崎	2	2									2	3	4	5	6	7	8	情
販売店	大豊	2	3									2	3	4	5	6	7	8	情

◎：免展 ◎：並大 ◎：並特 ◎：成行 41a 42 44

既存顧客 訪問件数 0 0 1 1 0 0 0 0
 新規開拓顧客 訪問件数 0 0 0 0 0 0 0 0
 情報源 訪問件数 0 0 0 0 0 0 0 0
 合計 0 0 1 1 0 0 0 0

45

[Drawing 6]

月間訪問予定/実績入力

予定印刷

9月底日 95/09/05 訪問目的を入力してください 日(金)

既存顧客 62

顧客分類 61

販売店 零售展示会出欠確認
 販売店 物件情報収集
 販売店 目録チャレンジキャンペーン結果報告・お礼
 販売店 上司同行

販売店 零售展示会出欠確認
 販売店 目録チャレンジキャンペーン結果報告・お礼
 販売店 目録チャレンジキャンペーン感想伺い
 販売店 カタログメンテナンス
 販売店 店頭在庫のチェック
 販売店 在庫確認
 販売店 顧客情報収集
 販売店 競合情報収集
 販売店 物件情報収集
 販売店 説明会後の情報収集
 販売店 土曜銀行
 販売店 業界内、近隣
 販売店 ショールーム案内
 販売店 集金
 販売店 展示会出欠確認
 販売店 商品説明会
 販売店 L・Lセット機集

了解

◎：免展 ◎：並大 ◎：並特 ◎：成行

既存顧客 訪問件数 0 0 0 0 0 0 0 0
 新規開拓顧客 訪問件数 0 0 0 0 0 0 0 0
 情報源 訪問件数 0 0 0 0 0 0 0 0
 合計 0 0 1 1 0 0 0 0

[Drawing 7]

営業行為予定/実績入力

終了 顧客名: 長島興業 95年09月04日 予定入力 74 トピックス 71

すべきこと 09/01-09/08 (キャンペーン) 72

名称	営業行為
春夏新作展示会 出欠確認	
日曜カワヤパー 結果報告・お礼	
カワヤパーの贈答付い	

(営業基本行為)

営業行為	一覧
370アワード	
店頭在庫チェック	

75 73

営業ステータス

実施日 面談者	コメント
07/31 松井社長	キャンペーンについては対象者の中からもしか達成できそうもない。河原主任については同行販売を依頼された。
08/07 河原主任	華新化成へ同行訪問。5台程度の見込み。商品知識が不足しているもので、営業マン向け勉強会を早期実施する。
08/11 斎藤部長	クレーム処理で訪問。納期遅れが発生したため、斎藤部長から引越後、斎藤部長へ連絡する。斎藤部長からは以後充分

営業ステータス入力

キャンペーン
基本行為
マリンノスビル
平塚営業所

[Drawing 8]

営業行為予定/実績入力

終了 顧客名: 長島興業 95年09月04日 予定入力 74 トピックス

83

すべきこと 09/01-09/08

受注予定日 95/11/30

受注金額 5,000 (千円)

受注確立 C 関

81

メモ

実施日	営業行為	メモ
08/03	現場見学	7月末
08/13	レイアウト打ち	
08/20	(再)レイアウト	
08/25	商品打ち合わせ	
	提案書提出	8月末
	見積り書提出	
	受注	11月末
	納品立ち会い	12月中旬

82

全打ち合わせ・その他

営業ステータス

実施日 面談者	コメント
08/20 原部長	前回打ち合わせ時より、組織変更があり、再度レイアウト作り直し。次回商品打ち合わせ時に商品サンプルを持参する予定。
08/25 原部長	井原部長に、持参したサンプルの色が自社のイメージにあわないと指摘された。次回打ち合わせ時に再度サンプルを持参する予定。
08/26 須藤部長より	当社ホームページへ案内し、全体のイメージ、実際に活用しているときのイメージを井原部長にわかせてもらい、さらに当社の

営業ステータス入力

キャンペーン
基本行為
マリンノスビル
平塚営業所

[Drawing 9]

登録行為予定/実績入力

終了 顧客名: 長島興業 95年09月04日 予定入力 トピックス

キャンペーン

すべきこと 09/01

受注予定日 95/

受注金額 5,000

受注確立 C

水

実施日	登録行為
08/03	現地見学
08/13	レイアウト
08/20	〈再〉レイアウト
08/25	商品打ち合わせ
09/04	カーポート案内
	写真撮影提出
	見積り書提出
	受注
	納品立ち会い

ツール一覧の印刷

今週の計画 実施には以下のツールが必要です

ツール一覧	0
目録チャレンジキャンペーン結果報告書	0
ショールーム案内状	0

印刷しますか?

OK キャンセル

コメント

打ち合わせ時より
変更があり、
レイアウト作り直
し商品打ち合わせ
と商品サンプルを
する予定。

それに、持参した
資料の色が自社の
イメージにあわないと
された。次回打ち
合わせ時に再度サ
ンプルを送る予定。

カーポート案内し
たが、実際に活
用するイメージ
がイメージにわか
らぬ。さらに当社の

マリンビル

平塚駅前店

☆打ち合わせ・その他

登録ステータス入力

[Translation done.]

* NOTICES *

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3. In the drawings, any words are not translated.

CORRECTION or AMENDMENT

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[Procedure amendment 1]

[Document to be Amended] Specification.

[Item(s) to be Amended] Claim.

[Method of Amendment] Change.

[Proposed Amendment]

[Claim(s)]

[Claim 1] While drawing up the operating-activities plan for various customers, it is an improvement support system in operating productivity for managing the progress.

A planned [to draw up the operating-activities plan for the above-mentioned various customers by registering each doing business performed according to a day based on the above-mentioned operation plan, while creating the operation plan of a business talk process which put in order the operating basic act repeatedly carried out in a predetermined cycle, the operating effective act carried out as the schedule set up beforehand, and a series of doing business in a business talk] creation means,

An actual result registration means to register the actual activity result based on the operating-activities plan drawn up by the above-mentioned planned creation means,

A status-control means to divide progress of operating activities into three kinds, the above-mentioned operating basic act, the above-mentioned operating effective act, and the above-mentioned business talk process, and to manage it based on each data of the activity result registered by the operating-activities plan and the above-mentioned actual result registration means which were created by the above-mentioned planned creation means, The improvement support system in operating productivity characterized by having a display-control means to control to divide and display the operation plan of the above-mentioned operating basic act, the above-mentioned operating effective act, and the above-mentioned business talk process on the screen for registering each doing business performed according to the above-mentioned day.

[Claim 2] It manages [whether when the above-mentioned status-control means has registered each doing business performed according to the above-mentioned day based on each data of the activity result registered by the operation plan of various operating basic acts and the above-mentioned actual result registration means created by the above-mentioned planned creation means, in it, the above-mentioned various operating basic acts are within the operation period based on the above-mentioned predetermined cycle, and].

The above-mentioned display-control means is an improvement support system in operating productivity according to claim 1 characterized by controlling to display on the screen for registering each doing business which performs only the operating basic act done to it being within the operation period based on the above-mentioned predetermined cycle by the above-mentioned status-control means according to the above-mentioned day.

[Claim 3] It manages [whether the above-mentioned status-control means is within the operation period based on

the schedule which carried out / above-mentioned / a setup in the above-mentioned various operating effective acts when having registered each doing business performed according to the above-mentioned day based on each data of the activity result registered by the operation plan of various operating effective acts and the above-mentioned actual result registration means which were created by the above-mentioned planned creation means, and].

The above-mentioned display-control means is an improvement support system in operating productivity according to claim 1 characterized by controlling to display on the screen for registering each doing business which performs only the operating effective act done to it being within the operation period based on the schedule which carried out [above-mentioned] a setup by the above-mentioned status-control means according to the above-mentioned day.

[Claim 4] The operation plan of the various operating basic acts that the above-mentioned status-control means was created by the above-mentioned planned creation means, and various operating effective acts, It is based on each data with the activity result registered by the above-mentioned actual result registration means. [whether when having registered each doing business performed according to the above-mentioned day, the above-mentioned various operating basic acts occur within the operation period based on the above-mentioned predetermined cycle, and] And when having registered each doing business performed according to the above-mentioned day, it manages whether it is within the operation period based on the schedule in which the above-mentioned various operating effective acts carried out [above-mentioned] a setup.

It is the improvement support system according to claim 1 in operating productivity carry out controlling to display on the screen for registering each doing business which performs only the operating effective act done to it being within the operation period based on the operating basic act done to the above-mentioned display-control means being within the operation period based on the above-mentioned predetermined cycle by the above-mentioned status-control means, and the schedule which carried out [above-mentioned] a setup according to the above-mentioned day as the feature.

[Claim 5] While drawing up the operating-activities plan for various customers, it is an improvement support system in operating productivity for managing the progress.

A planned [to create by registering each doing business performed according to a day based on the operation plan while creating the operation plan of the business which includes the operating-activities plan for the above-mentioned various customers for various doing business] creation means,

The improvement support system in operating productivity carried out [having had a display-control means controlled to display on the screen for registering each doing business which performs only the act which became the timing which should be carried out based on the above-mentioned operation plan among various doing businesses contained in the operation plan of the business created by the above-mentioned planned creation means according to the above-mentioned day, and] as the feature.

[Claim 6] The above-mentioned planned creation means is a means for defining correlation with the documents of addressing to a customer used by doing business and the doing business concerned of each which is performed according to the above-mentioned day.

The improvement support system in operating productivity given in any 1 term of the claims 1-5 characterized by including a means to show automatically the documents of the above-mentioned addressing to a customer with which correlation is defined as each above-mentioned doing business.

[Claim 7] The above-mentioned actual result registration means is equipped with the means for inputting the arbitrary comments to an actual activity result.

The above-mentioned display-control means is an improvement support system in operating productivity given in any 1 term of the claims 1-6 characterized by controlling to display on the screen for registering each doing business which performs the comment by which the input was carried out [above-mentioned] according to the above-mentioned day.

[Procedure amendment 2]

[Document to be Amended] Specification.

[Item(s) to be Amended] 0009.

[Method of Amendment] Change.

[Proposed Amendment]

[0009]

[Means for Solving the Problem] As for the improvement support system in operating productivity of this invention, this invention is characterized by the improvement support system in operating productivity for managing the progress possessing the following while it draws up the operating-activities plan for various customers. A planned [to draw up the operating-activities plan for the above-mentioned various customers by registering each doing business performed according to a day based on the above-mentioned operation plan, while creating the operation plan of a business talk process which put in order the operating basic act repeatedly carried out in a predetermined cycle, the operating effective act carried out as the schedule setup beforehand, and a series of doing businesses in a business talk] creation means. An actual result registration means to register the actual activity result based on the operating-activities plan drawn up by the above-mentioned planned creation means. A status-control means to divide progress of operating activities into three kinds, the above-mentioned operating basic act, the above-mentioned operating effective act, and the above-mentioned business talk process, and to manage it based on each data of the activity result registered by the operating-activities plan and the above-mentioned actual result registration means which were created by the above-mentioned planned creation means. A display-control means to

control to divide and display the operation plan of the above-mentioned operating basic act, the above-mentioned operating effective act, and the above-mentioned business task process on the screen for registering each doing business performed according to the above-mentioned day.

[Procedure amendment 3]

[Document to be Amended] Specification.

[Item(s) to be Amended] 0010.

[Method of Amendment] Change.

[Proposed Amendment]

[0010] In other modes of this invention, the above-mentioned status-control means It is based on each data of the activity result registered by the operation plan of various operating basic acts and the above-mentioned actual result registration means which were created by the above-mentioned planned creation means. It manages whether when having registered each doing business performed according to the above-mentioned day, the above-mentioned various operating basic acts occur within the operation period based on the above-mentioned predetermined cycle. the above-mentioned display-control means It is characterized by controlling to display on the screen for registering each doing business which performs only the operating basic act done to it being within the operation period based on the above-mentioned predetermined cycle by the above-mentioned status-control means according to the above-mentioned day.

[Procedure amendment 4]

[Document to be Amended] Specification.

[Item(s) to be Amended] 0011.

[Method of Amendment] Change.

[Proposed Amendment]

[0011] In the mode of others of this invention, the above-mentioned status-control means It is based on each data of the activity result registered by the operation plan of various operating effective acts and the above-mentioned actual result registration means which were created by the above-mentioned planned creation means. It manages whether it is within the operation period based on the schedule in which the above-mentioned various operating effective acts carried out [above-mentioned] a setup when having registered each doing business performed according to the above-mentioned day. the above-mentioned display-control means It is characterized by controlling to display on the screen for registering each doing business which performs only the operating effective act done to it being within the operation period based on the schedule which carried out [above-mentioned] a setup by the above-mentioned status-control means according to the above-mentioned day.

[Procedure amendment 5]

[Document to be Amended] Specification.

[Item(s) to be Amended] 0012.

[Method of Amendment] Change.

[Proposed Amendment]

[0012] In the mode of others of this invention, the above-mentioned status-control means The operation plan of the various operating basic acts created by the above-mentioned planned creation means and various operating effective acts, It is based on each data with the activity result registered by the above-mentioned actual result registration means. [whether when having registered each doing business performed according to the above-mentioned day, the above-mentioned various operating basic acts occur within the operation period based on the above-mentioned predetermined cycle, and] It manages whether it is within the operation period based on the schedule in which the above-mentioned various operating effective acts carried out [above-mentioned] a setup when having registered each doing business performed according to the above-mentioned day. and the above-mentioned display-control means By the above-mentioned status-control means It is characterized by controlling to display on the screen for registering each doing business which performs only the operating effective act done to it being within the operation period based on the operating basic act done to it being within the operation period based on the above-mentioned predetermined cycle, and the schedule which carried out [above-mentioned] a setup according to the above-mentioned day.

[Procedure amendment 6]

[Document to be Amended] Specification.

[Item(s) to be Amended] 0013.

[Method of Amendment] Change.

[Proposed Amendment]

[0013] In the mode of others of this invention, this invention is characterized by the improvement support system in operating productivity for managing the progress possessing the following while it draws up the operating-activities plan for various customers. A planned [to create by registering each doing business performed according to a day based on the operation plan while creating the operation plan of the business which includes the operating-activities plan for the above-mentioned various customers for various doing business] creation means. A display-control means to control to display on the screen for registering each doing business which performs only the action which became the timing which should be carried out based on the above-mentioned operation plan among various doing business contained in the operation plan of the business created by the above-mentioned planned creation means according to the above-mentioned day.

[Procedure amendment 7]

[Document to be Amended] Specification.

[Item(s) to be Amended] 0014.

[Method of Amendment] Change.

[Proposed Amendment]

[0014] In the mode of others of this invention, the above-mentioned planned creation means is characterized by including the means for defining correlation with the documents of addressing to a customer used by doing business and the doing business concerned of each which is performed according to the above-mentioned day, and a means to show automatically the documents of the above-mentioned addressing to a customer with which correlation is defined as each above-mentioned doing business.

[Procedure amendment 8]

[Document to be Amended] Specification.

[Item(s) to be Amended] 0015.

[Method of Amendment] Change.

[Proposed Amendment]

[0015] In the mode of others of this invention, the above-mentioned actual result registration means is equipped with the means for inputting the arbitrary comments to an actual activity result, and the above-mentioned display-control means is characterized by controlling to display on the screen for registering each doing business which performs the comment by which the input was carried out [above-mentioned] according to the above-mentioned day.

[Procedure amendment 9]

[Document to be Amended] Specification.

[Item(s) to be Amended] 0016.

[Method of Amendment] Change.

[Proposed Amendment]

[0016] Since this invention consists of the above-mentioned technical means, in various operating activities, the operating effective act and the operating basic act that properties differ, and a business talk process arrange separately, respectively, a status control comes to be carried out, and it becomes possible to grasp progress of operating activities exactly from the three above-mentioned kinds of viewpoints. Moreover, since the operating basic act and the operating effective act by which the status control is carried out as mentioned above separately, and a business talk process divide into the registration screen of doing business performed according to a day and it comes to be displayed on it according to this invention, the business manager who forms an operating-activities plan becomes that it is possible to arrange and understand the act which should be done now from the three above-mentioned kinds of viewpoints, in case each doing business performed according to the above-mentioned day registers.

[Procedure amendment 10]

[Document to be Amended] Specification.

[Item(s) to be Amended] 0017.

[Method of Amendment] Change.

[Proposed Amendment]

[0017] Moreover, the inside of the various operating basic actions which were beforehand created as an operation plan of operating activities according to other features of this invention, or various operating effective actions, Since only the action which became the timing which should be carried out based on the above-mentioned operation plan comes to be displayed on the registration screen of each doing business performed according to a day, the business manager who looked at the registration screen becomes possible [checking to timely the optimal doing business which should be carried out day by day]. Moreover, it is possible to define beforehand correlation with the documents of addressing to a customer used by each doing business to various doing business according to the feature of others of this invention. Since the documents of addressing to a customer related with doing business chosen on the occasion of formulation of a operating plan are automatically shown when this correlation is defined, even if a business manager is not conscious of especially documents required at the time of operating planned implementation, it becomes possible to obtain the documents certainly. Moreover, according to the feature of others of this invention, a business manager becomes possible [drawing up a future activity plan with reference to the comment (the advice inputted by the manager etc. being included) inputted to actual operating activities], and can stand concrete strategy interactively.

[Translation done.]

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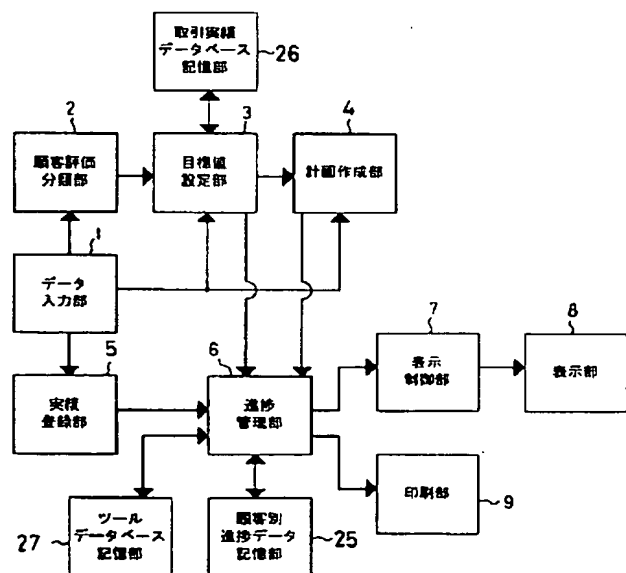
(74) 代理人 弁理士 國分 孝悦

(54) 【発明の名称】 営業生産性向上支援システム

(57) 【要約】

【課題】 営業活動の最適な標準化を図り、営業生産性を革新的に向上させることができるようにする。

【解決手段】 計画作成部4により作成された営業活動計画および実績登録部5により登録された活動結果の各データに基づいて、営業活動の進捗を、所定のサイクルで繰り返して実施する営業基本行為、あらかじめ設定した日程通りに実施する営業有効行為、および商談における一連の営業行為を並べた商談プロセスの3種類に分けて管理する進捗管理部6を設け、種々の営業活動の中で性質が異なる営業有効行為と営業基本行為と商談プロセスとの3種類の観点から営業活動の進捗を的確に把握することができるようにすることにより、営業生産性を向上させるために最適な営業活動の計画を営業マンがより容易に作成することができるようにする。



【特許請求の範囲】

【請求項1】 種々の顧客に対する営業活動計画を作成するとともに、その進捗を管理するための営業生産性向上支援システムであって、
上記種々の顧客に対する営業活動計画を作成する計画作成手段と、
上記計画作成手段により作成された営業活動計画に基づく実際の活動結果を登録する実績登録手段と、
上記計画作成手段により作成された営業活動計画および上記実績登録手段により登録された活動結果の各データに基づいて、営業活動の進捗を、所定のサイクルで繰り返して実施する営業基本行為、あらかじめ設定した日程通りに実施する営業有効行為、および商談における一連の営業行為を並べた商談プロセスの3種類に分けて管理する進捗管理手段とを備えたことを特徴とする営業生産性向上支援システム。

【請求項2】 上記計画作成手段は、上記営業基本行為、上記営業有効行為および上記商談プロセスの実施企画を作成するとともに、上記実施企画に基づいて日別に行う個々の営業行為を登録することにより上記営業活動計画を作成するようになされ、
上記日別に行う個々の営業行為を登録するための画面に、上記営業基本行為、上記営業有効行為および上記商談プロセスの実施企画を分けて表示するように制御する表示制御手段を備えたことを特徴とする請求項1に記載の営業生産性向上支援システム。

【請求項3】 上記進捗管理手段は、上記計画作成手段により作成された種々の営業基本行為の実施企画および上記実績登録手段により登録された活動結果の各データに基づいて、上記日別に行う個々の営業行為を登録している時点で上記種々の営業基本行為が上記所定のサイクルに基づく実施期間内にあるかどうかを管理し、
上記表示制御手段は、上記進捗管理手段により上記所定のサイクルに基づく実施期間内にあるとされた営業基本行為だけを上記日別に行う個々の営業行為を登録するための画面に表示するように制御することを特徴とする請求項2に記載の営業生産性向上支援システム。

【請求項4】 上記進捗管理手段は、上記計画作成手段により作成された種々の営業有効行為の実施企画および上記実績登録手段により登録された活動結果の各データに基づいて、上記日別に行う個々の営業行為を登録している時点で上記種々の営業有効行為が上記設定した日程に基づく実施期間内にあるかどうかを管理し、
上記表示制御手段は、上記進捗管理手段により上記設定した日程に基づく実施期間内にあるとされた営業有効行為だけを上記日別に行う個々の営業行為を登録するための画面に表示するように制御することを特徴とする請求項2に記載の営業生産性向上支援システム。

【請求項5】 上記進捗管理手段は、上記計画作成手段により作成された種々の営業基本行為および種々の営業

有効行為の実施企画と、上記実績登録手段により登録された活動結果との各データに基づいて、上記日別に行う個々の営業行為を登録している時点で上記種々の営業基本行為が上記所定のサイクルに基づく実施期間内にあるかどうか、および上記日別に行う個々の営業行為を登録している時点で上記種々の営業有効行為が上記設定した日程に基づく実施期間内にあるかどうかを管理し、
上記表示制御手段は、上記進捗管理手段により上記所定のサイクルに基づく実施期間内にあるとされた営業基本行為および上記設定した日程に基づく実施期間内にあるとされた営業有効行為だけを上記日別に行う個々の営業行為を登録するための画面に表示するように制御することを特徴とする請求項2に記載の営業生産性向上支援システム。

【請求項6】 種々の顧客に対する営業活動計画を作成するとともに、その進捗を管理するための営業生産性向上支援システムであって、
上記種々の顧客に対する営業活動計画を、種々の営業行為を含む営業の実施企画を作成するとともにその実施企画に基づいて日別に行う個々の営業行為を登録することにより作成する計画作成手段と、
上記計画作成手段により作成された営業の実施企画に含まれる種々の営業行為のうち、上記実施企画に基づいて実施すべきタイミングになった行為だけを、上記日別に行う個々の営業行為を登録するための画面に表示するように制御する表示制御手段とを備えたことを特徴とする営業生産性向上支援システム。

【発明の詳細な説明】**【0001】**

【発明の属する技術分野】 本発明は営業生産性向上支援システムに関し、特に、営業マンが行う営業活動を効率よく行うことを支援するためのシステムに用いて好適なものである。

【0002】

【従来の技術】 一般に、営業活動は人間が人間に対して行うことであるため、従来はその標準化あるいはシステム化が困難であった。このため、販売管理や製造管理、あるいは組織管理などの分野で情報化が進む一方で、多くの営業マンは経験と勘に頼りながら営業活動を行っていた。

【0003】 一方、市場が低成長時代に入り、競争がますます激化していく中で、企業経営が見直され、できるだけ少ない時間、人、設備などの経営資産で多くの収益を上げられるようにすることが着目されるようになってきている。このように営業の生産性を向上させるためには、適切な方法で営業活動を行うことが必要になってくる。

【0004】

【発明が解決しようとする課題】 しかしながら、営業活動の方法は、ほとんどの企業で営業マンまかせになって

いたため、営業マンの思い込みや成り行きなどが営業活動にむらや無駄を生じていた。その中で、実績を上げ、優秀だと言われてきた営業マンは、自分で工夫をし、自分の力で最適な営業方法を見つけ出しているのが現実であった。

【0005】ところが、企業の中で優秀な営業マンはほんの一握りしか存在しない。したがって、企業として本質的に営業生産性を革新的に向上させるためには、優秀な営業マン以外のいわゆる標準的な営業マンの活動内容を見直す必要がある。

【0006】また、近年におけるパーソナルコンピュータの普及に伴い、例えば、従来はワープロ等で作成した週間活動計画書に活動計画を手書きで記入し、その結果を集計して次に活かすという作業を行っていたのを、パソコンを使うことによって、営業マンの労力が多少なりとも軽減されるようになった。

【0007】しかし、営業マンが使っているパソコンのアプリケーションソフトは、せいぜいワープロソフトやスプレッドシート、あるいはデータベースなどであり、しかもその使い方は各自の裁量に委ねられている。これでは、パソコンを単なる事務処理の道具として使っているだけであり、しかも、複雑・多機能化したアプリケーションソフトを使うために多くの労力を要するため、営業生産性の向上を支援することは到底できなかった。

【0008】本発明は、このような実情に鑑みて成されたものであり、営業活動の最適な標準化を図り、営業生産性を革新的に向上させることができるようにすることを目的とする。

【0009】

【課題を解決するための手段】本発明の営業生産性向上支援システムは、種々の顧客に対する営業活動計画を作成するとともに、その進捗を管理するための営業生産性向上支援システムであって、上記種々の顧客に対する営業活動計画を作成する計画作成手段と、上記計画作成手段により作成された営業活動計画に基づく実際の活動結果を登録する実績登録手段と、上記計画作成手段により作成された営業活動計画および上記実績登録手段により登録された活動結果の各データに基づいて、営業活動の進捗を、所定のサイクルで繰り返して実施する営業基本行為、あらかじめ設定した日程通りに実施する営業有効行為、および商談における一連の営業行為を並べた商談プロセスの3種類に分けて管理する進捗管理手段とを備えたことを特徴とするものである。

【0010】本発明の他の特徴とするところは、上記計画作成手段は、上記営業基本行為、上記営業有効行為および上記商談プロセスの実施企画を作成するとともに、上記実施企画に基づいて日別に行う個々の営業行為を登録することにより上記営業活動計画を作成するようになされ、上記日別に行う個々の営業行為を登録するための画面に、上記営業基本行為、上記営業有効行為および上

記商談プロセスの実施企画を分けて表示するように制御する表示制御手段を備えたことを特徴とするものである。

【0011】本発明のその他の特徴とするところは、上記進捗管理手段は、上記計画作成手段により作成された種々の営業基本行為の実施企画および上記実績登録手段により登録された活動結果の各データに基づいて、上記日別に行う個々の営業行為を登録している時点で上記種々の営業基本行為が上記所定のサイクルに基づく実施期間内にあるかどうかを管理し、上記表示制御手段は、上記進捗管理手段により上記所定のサイクルに基づく実施期間内にあるとされた営業基本行為だけを上記日別に行う個々の営業行為を登録するための画面に表示するように制御することを特徴とするものである。

【0012】本発明のその他の特徴とするところは、上記進捗管理手段は、上記計画作成手段により作成された種々の営業有効行為の実施企画および上記実績登録手段により登録された活動結果の各データに基づいて、上記日別に行う個々の営業行為を登録している時点で上記種々の営業有効行為が上記設定した日程に基づく実施期間内にあるかどうかを管理し、上記表示制御手段は、上記進捗管理手段により上記設定した日程に基づく実施期間内にあるとされた営業有効行為だけを上記日別に行う個々の営業行為を登録するための画面に表示するように制御することを特徴とするものである。

【0013】本発明のその他の特徴とするところは、上記進捗管理手段は、上記計画作成手段により作成された種々の営業基本行為および種々の営業有効行為の実施企画と、上記実績登録手段により登録された活動結果との各データに基づいて、上記日別に行う個々の営業行為を登録している時点で上記種々の営業基本行為が上記所定のサイクルに基づく実施期間内にあるかどうか、および上記日別に行う個々の営業行為を登録している時点で上記種々の営業有効行為が上記設定した日程に基づく実施期間内にあるかどうかを管理し、上記表示制御手段は、上記進捗管理手段により上記所定のサイクルに基づく実施期間内にあるとされた営業基本行為および上記設定した日程に基づく実施期間内にあるとされた営業有効行為だけを上記日別に行う個々の営業行為を登録するための画面に表示するように制御することを特徴とするものである。

【0014】本発明のその他の特徴とするところは、種々の顧客に対する営業活動計画を作成するとともに、その進捗を管理するための営業生産性向上支援システムであって、上記種々の顧客に対する営業活動計画を、種々の営業行為を含む営業の実施企画を作成するとともにその実施企画に基づいて日別に行う個々の営業行為を登録することにより作成する計画作成手段と、上記計画作成手段により作成された営業の実施企画に含まれる種々の営業行為のうち、上記実施企画に基づいて実施すべきタ

イミングになった行為だけを、上記日別に行う個々の営業行為を登録するための画面に表示するように制御する表示制御手段とを備えたことを特徴とするものである。

【0015】本発明は上記技術手段より成るので、種々の営業活動の中で性質が異なる営業有効行為と営業基本行為と商談プロセスとがそれぞれ別々に整理して進捗管理されるようになり、営業活動の進捗を上記3種類の観点からの確に把握することが可能となる。

【0016】また、本発明の他の特徴によれば、日別に行う営業行為の登録画面に、上述のようにして別々に進捗管理されている営業基本行為と営業有効行為と商談プロセスとが分けて表示されるようになるので、営業活動計画を立てる営業マンは、上記日別に行う個々の営業行為を登録する際に、今やるべき行為を上記3種類の観点から整理して理解することが可能となる。

【0017】また、本発明のその他の特徴によれば、営業活動の実施企画としてあらかじめ作成しておいた種々の営業基本行為あるいは種々の営業有効行為のうち、上記実施企画に基づいて実施すべきタイミングになった行為だけが、日別に行う個々の営業行為の登録画面に表示されるようになるので、その登録画面を見た営業マンは、日ごとに実施すべき最適な営業行為を適時に確認することが可能となる。

【0018】

【発明の実施の形態】以下に、本発明による営業生産性向上支援システムの一実施形態を図面に基づいて説明する。図1は、本実施形態による営業生産性向上支援システムの要素的特徴を示す機能ブロック図である。また、図2は、図1に示した各機能ブロックを具体的に実施するためのハードウェア構成を示す図である。

【0019】図2に示したように、本実施形態の営業生産性向上支援システムは、一般的に普及しているパソコンシステムによって実現される。すなわち、同図において、21はCPU、ROM、RAMなどを内蔵したパソコン本体、22はキーボード、23はマウス、24はディスプレイ装置である。図示はしていないが、複数のパソコン本体21をネットワークを介して接続して、相互にデータのやり取りをするようにすることが可能である。

【0020】25は顧客別進捗管理データ記憶部であり、営業マンによって入力される訪問計画や訪問結果、あるいはマネージャーなどの支援組織によって入力される営業活動の企画内容などに基づく顧客別の進捗データが記憶される。26は取引実績データ記憶部であり、顧客との取引実績に関するデータが記憶されている。

【0021】27はツールデータベース記憶部であり、営業活動の実施にあたって必要な種々のツールのデータが、上記営業活動を構成する個々の営業行為と対応付けて記憶される。上記種々のツールとしては、例えば、顧客に対する興味付けツール、反応伺いツール、顧客別興

味付け進捗管理シート、ビジネスチャンス情報収集ツール、キーマン評価ツールなどを挙げることができる。

【0022】28は必要ツール作成部であり、上記ツールデータベース記憶部27に記憶されている各種のツールの中から選択されたツールを実際に作成するものであり、例えば顧客あての書類を印刷するための印刷装置などで構成される。

【0023】なお、上記した顧客別進捗管理データ記憶部25、取引実績データ記憶部26およびツールデータベース記憶部27は、例えばハードディスクやフロッピーディスクなどの記憶媒体によって構成される。ハードディスクで構成される場合は、パソコン本体21に内蔵される場合もある。また、フロッピーディスクで構成される場合は、そのフロッピーディスクを図示しない形態端末で使用することも可能である。

【0024】営業マンは、このような構成のパソコンシステムを用いて営業計画を作成し、その計画を実行し、実行結果を評価することにより営業活動を実施する。これにより、以下に説明するように、営業マンの経験や勘に頼っていた従来に対して、本実施形態では営業活動の標準化を図ることができ、営業生産性を向上させることができるようになる。

【0025】次に、図1において、1はデータ入力部であり、図2に示したキーボード22およびマウス23により構成される。2は顧客評価・分類部であり、一定の評価基準の下に種々の顧客を評価・分類する。以下、この顧客評価の方法を、次に示す図3に基づいて説明する。

【0026】図3から明らかなように、本実施形態では、購買力評価と取引評価との2つの側面から顧客を評価している。顧客の購買力を客観的に評価する購買力評価の評価項目としては、例えば、年間売上、経営者のやる気、将来性、立地条件、売上伸長率などがあり、これらの項目は相手企業（顧客）のポテンシャル（能力）を考慮したものとして把握される。

【0027】また、自社との取引状況を評価する取引評価の評価項目としては、例えば、年間取引高、粗利率、占有率、回収条件などがあり、これらの項目は自企業の立場を考慮したものとして把握される。

【0028】また、本実施形態の顧客評価・分類部2は、上述のようにして行った評価に基づいて顧客を4つの分類に分けている。すなわち、図3(a)に示したように、購買力評価の結果を縦軸にとり、取引評価の結果を横軸にとり、それぞれの評価の高低に応じて顧客を発展客、拡大客、維持客および成行客の4つの分類に分けている。

【0029】ここで、発展客とは、購買力評価の結果と取引評価の結果とが何れも高い顧客であり、いい得意先でしかも発展性がある顧客のことを言う。また、拡大客とは、取引評価の結果は低い、購買力評価の結果が高

い顧客で、営業活動に何らかの改善を加えれば取引が更に拡大する可能性のある顧客のことを言う。

【0030】また、維持客とは、取引評価の結果は高いが、購買力評価の結果が低い顧客で、いい得意先だが発展性に欠ける顧客のことを言う。さらに、成行客とは、購買力評価の結果と取引評価の結果とが何れも低い顧客で、発展性がない顧客のことを言う。

【0031】本実施形態では、購買力評価および取引評価の各項目に対して入力すべき数値や内容をシステムにあらかじめ複数種類登録しておき、マネージャーがその中から1つをマウス23で選択すると、その選択した内容が、顧客評価・分類部2により5点満点の評価点に自動的に置き換えられる。そして、それら各評価項目ごとの評価点が自動的に集計され、その集計結果が図3

(b)に示す座標系にプロットされることにより、各顧客が4つの分類に分けられるようになっている。

【0032】再び図1に戻って説明する。3は目標値設定部であり、顧客別の月間訪問回数の目標値を設定するものである。すなわち、営業マンは、上記顧客評価・分類部2による評価・分類の結果に基づいて、取引実績データベース記憶部26に記憶されている過去の取引実績に従って定められた取引予算数値を実現するために最適な顧客別月間訪問回数の目標値を、データ入力部1を用いて入力する。

【0033】ここで、営業マンは、上述のようなマネージャーによる評価・分類によって明確にされた取引拡大したい顧客に対して訪問回数が多くなるように目標値を設定することにより、営業訪問力を取引拡大したい顧客に適正に配分することができるようになる。なお、営業生産性を効率よく向上させるには、発展客、拡大客、維持客、成行客の順番で営業力を多く配分するのが好ましい。

【0034】なお、上記顧客評価・分類部2による評価・分類の結果は、図示しない目標値の設定画面において、顧客名が属する分類ごとに異なる色で表示されることによって反映されるようになっているので、営業マンは、どの顧客に対して訪問回数を多く設定すべきかを一目で理解することができる。

【0035】ところで、従来より、販売管理資料が存在していたが、この販売管理資料は専ら自企業の立場からの取引評価のみを行うものであった。これに対して本実施形態では、図3のように購買力評価も行い、顧客のポテンシャルも考慮して評価・分類を行っている。これにより、顧客の評価をより正確に行うことができ、営業マンは、限られた営業訪問力を取引拡大したい顧客に適正に配分することができるようになる。

【0036】上記目標値設定部3により設定された顧客別月間訪問回数の目標値は、進捗管理部6を介して顧客別進捗管理データ記憶部26に与えられ、記憶される。また、顧客別進捗管理データ記憶部26に記憶された上

記顧客別月間訪問回数の目標値は、進捗管理部6を介して表示制御部7に与えられ、この表示制御部7による制御の下で所定の形式に従って表示部8に表示される。

【0037】図4は、上記表示部8に表示される画面の一例を示す図であり、営業マン用の月間訪問予定／実績入力画面を示している。この画面では、発展客、拡大客、維持客、成行客と営業力を多く配分すべき順番で、営業マンが担当している顧客名が色分けされて一覧で表示される。このように、本実施形態では、より大切な顧客が上から順に目に効果的に飛び込んでくるように工夫が凝らされている。

【0038】また、上述のようにして目標値設定部3で設定された訪問回数の目標値は、図4中の予定／実績表示エリア41に反映されて表示される。すなわち、上記予定／実績表示エリア41において、太線で囲んだ領域41aの凸凹が訪問回数の目標値を表している（以下、この領域を訪問回数表示領域という）。つまり、同領域41a内にある□（実際には、予定／実績表示エリア41の背景色は灰色で、訪問回数表示領域41a内の□は白色で表示されることにより区別されている）の数が訪問回数の目標値に対応している。

【0039】再び図1において、4は計画作成部であり、営業マンやマネージャーがデータ入力部1を操作して入力したデータに基づいて、営業マンの営業活動計画（商談プロセスを含む）を作成するものである。このとき、マネージャーは、種々の営業活動の実施企画を登録する。また、営業マンは、訪問予定日を入力するとともに、上記実施企画に基づいて上記訪問予定日に行う個々の営業行為を登録する。また、5は実績登録部であり、計画した営業活動を営業マンが実際に行った場合に、その訪問結果を実績として登録するものである。

【0040】図4および図5は、営業マン用の月間訪問予定／実績入力画面の例を示す図であるが、本実施形態では実績入力を行った後に予定入力を行うようになっているため、まず最初に図4のような実績入力モードの画面が現れる。なお、予定入力モードへの切り替えは、予定／実績切替ボタン43を押すことによって行う。

【0041】図4および図5において、訪問回数表示領域41a内の白い□の中の数字は、訪問予定日および訪問実施日を表している。ここでは、訪問予定日を青色の数字で表し、訪問実施日を赤色の数字で表すようにしている。なお、図面の都合上、赤色表示の日付を通常の数字で表し、青色表示の日付を○付きの数字で表している。このように、本実施形態では、訪問予定の日付と訪問実施の日付とを異なる色で表示するようにしているので、両者を一目で区別することができる。

【0042】また、上記訪問回数表示領域41a内において、斜線で示した部分は、実際には例えば黄色で表示されている領域である。この領域は、例えば、□の数で示された月間訪問回数目標値に対して実際に訪問した日

数が少なく、進捗の度合いが低い場合に警告を与えるために表示されるものであり、現時点で最優先に訪問すべき顧客とその回数とを示している。したがって、この黄色表示の領域は、月末に向かうほど多くなっていく。

【0043】訪問した実績を入力する際には、図4に示した訪問回数表示領域41a内の個々の□に訪問実施日を埋めていくという作業を行う。操作としては、日付選択エリア42内の訪問を実施した日付上にマウスカーソルを置き、マウスボタンをクリックする。これにより、その選択した日付が予定／実績表示エリア41にアニメーション効果によって走るようにして自動的に移動していき、訪問回数表示領域41a内にある個々の□に先頭から順番に赤い数字が埋められていく。

【0044】このとき、上記訪問回数表示領域41a内のある顧客についての白い□が全て赤い数字で埋まれば、その顧客については目標を達成したことになる。本実施形態では、目標を達成したときに、図示しないスピーカから効果音を出したり表示部8にメッセージを表示したりすることによって、目標が達成されたことを知らせるようにしている。

【0045】また、訪問計画を入力する際には、まず、予定／実績切替ボタン43を押して予定入力モードを選択する。すると、図4の画面から図5の画面に切り替わり、日付選択エリア42内の日付が予定入力用に切り替わる。このとき、それまで実績入力モードにおいて赤色で表示されていた数字が青色で表示されるようになる。また、上記訪問回数表示領域41a内の黄色の□のエリアも変化する。

【0046】次に、訪問実施日を入力したのと同じようにして、日付選択エリア42内の日付をマウスクリックして訪問予定日を入力することにより、訪問計画を作成していく。こうして訪問予定の日付を入力すると、各日付ごとの訪問件数の合計が訪問件数エリア44に表示される。これにより、営業マンが訪問可能な1日当たりの平均訪問件数と比較して、実現可能かどうかを確認することができる。

【0047】なお、図4、図5では、既存顧客についての月間訪問予定／実績入力画面を示しているが、本実施形態では、訪問目的が大きく異なる顧客、例えば新規開拓顧客、あるいは直接の取引はなくても色々な情報を提供してくれる情報源などについても、同じように画面を切り換えて操作できるようになっている。これら各種顧客の全体の訪問予定の様子は、画面の下方に棒グラフ45で表示される。

【0048】このように、本実施形態では、訪問計画を作成する際に、訪問回数表示領域41a内にある白い□の数を見ることによって月間訪問回数目標値を容易に確認することができ、白い□の数が多い顧客に対して訪問予定をより多く配分するという意識を働かせることができる。また、黄色表示の警告がされている顧客に対して

は、訪問予定を最優先で設定するという意識を働かせることもできる。このため、訪問回数目標値の達成を常に考慮した訪問計画の作成と実績のチェックとを行うことができるようになる。

【0049】営業マンは、上述した訪問予定日の他に、その訪問目的（営業行為）のデータを計画作成部5に入力することによって営業活動計画を作成する。例えば、図5の月間訪問予定／実績入力画面において「中村屋」の9月5日の訪問計画を立てる場合、日付選択エリア42内に表示されている5日の日付をマウスクリックすると、その日付がアニメーション効果によって訪問回数表示領域41aに埋められた後、図6のような画面が現れる。

【0050】図6に示す画面において、下方の大きいボックス61の中には、マネージャーが計画作成部4を用いて顧客別進捗データ記憶部25にあらかじめ記憶しておいた営業としてやるべき有効行為（実施企画）が一覧表示されている。この大きいボックス61には、カタログメンテナンスや在庫チェックなどの定期的に実施すべき営業基本行為と、春夏展示会出欠確認などの今やるべき営業有効行為とが入っている。

【0051】営業マンは、このような一覧表示を見ることで、営業行為としてやるべきことを確認することができる。そして、営業マンが任意の項目にマウスカーソルを合わせてクリックすると、その選択された営業行為が訪問目的として登録されるとともに、上方の小さいボックス62内に表示される。

【0052】このようにして簡単な作業で作成した訪問計画は、週間活動計画書として印刷部9より出力することができる。また、図示しない携帯端末などに上記訪問計画の情報を入力し、これを現場で確認しながら訪問活動を実施するようにすることもできる。

【0053】また、日別に行う営業行為を入力するための他の実施形態においては、上記図5の月間訪問予定／実績入力画面において、例えば「長島興業」の9月4日の訪問計画を立てようとする場合、日付選択エリア42内に表示されている4日の日付をマウスクリックすると、その日付がアニメーション効果によって訪問回数表示領域41aに埋められた後、図7のような手帳の画面が現れる。

【0054】図7において、ページの耳71をマウスクリックすることで、簡単にページめくりができるようになっている。図7は、1ページ目の画面を示すものであり、キャンペーンなどで行う営業有効行為の表示欄72と、定期的に実施すべき営業基本行為の表示欄73と、コメントなどを表示する営業ステータス表示欄74とを有している。また、図8は、2ページ目の画面を示すものであり、商談プロセスの大筋を表すガイド表示欄81と、1ページ目と同様の営業ステータス表示欄74とを有している。

【0055】これらの図7および図8から明らかなように、本実施形態では、種々の営業活動を、営業有効行為と、営業基本行為と、個別具体的な商談プロセスとに分けて進捗管理を行うようにしている。具体的には、進捗管理部6が、計画作成部4により登録された種々の営業行為を上記した3つのカテゴリーに整理して進捗管理を行っている。そして、表示制御部7を介して、図7および図8のように3つのカテゴリーを分けて表示部8に表示するようにしている。

【0056】ここで、営業有効行為とは、キャンペーンなどに代表される営業行為であり、営業を行う側で設定した日程通りに実施していく営業行為のことを言う。また、営業基本行為とは、特定のサイクルで繰り返して行うことが望ましいとされる基本的な営業行為のことを言う。また、商談プロセスは、商談の準備から受注に至るまでの連続した一連の営業行為を目的別に並べたもののことを言う。

【0057】このように、本実施形態では、種々の営業活動の中で性質が異なる営業有効行為と営業基本行為と商談プロセスとをそれぞれ別々に整理して進捗管理を行うようにするとともに、表示部8にも別々に表示するようにしている。したがって、営業マンは、種々の観点から今やるべき行為を直ちに知ることができるようになり、営業活動の計画をより的確に作成することができる。

【0058】以下に、具体的に説明する。まず、図7の営業有効行為表示欄72には、マネージャーが計画作成部4を用いてあらかじめ顧客別進捗データ記憶部25に記憶しておいた種々の営業有効行為のうち、9月1日～9月8日の期間内の実施タイミングになった行為だけが表示されるようになっている。

【0059】このことは、図1の計画作成部4により顧客別進捗データ記憶部25に記憶された種々の営業有効行為とその実施予定日との情報に基づいて、進捗管理部6が進捗管理を行い、実施タイミングになった営業有効行為だけを表示制御部7を介して表示部8に表示させることによって行っている。

【0060】図7の例では、春夏新作展示会に関しては「出欠確認」の営業有効行為が、目標チャレンジキャンペーンに関しては「結果報告・お礼」「キャンペーンの感想伺い」の2つの営業有効行為が、それぞれ9月1日～9月8日の期間内の実施タイミングになったとして営業有効行為表示欄72に表示されている。

【0061】また、営業基本行為表示欄73も上記営業有効行為表示欄72と同様に、マネージャーが計画作成部4を用いてあらかじめ顧客別進捗データ記憶部25に記憶しておいた種々の営業基本行為のうち、9月1日～9月8日の期間内の実施タイミングになった行為だけが表示されるようになっている。図7の例では、カタログメンテナンスおよび店頭在庫チェックの2つの営業基本

行為が実施タイミングになったとして表示されている。

【0062】このことは、以下のような処理によって実現している。すなわち、図1の顧客別進捗データ記憶部25には、マネージャーが計画作成部4によりあらかじめ作成しておいた種々の営業基本行為とそれらの最適な実施サイクルとの情報、および実績登録部5により登録された前回の実施日の情報が各行ごとに記憶されている。進捗管理部6は、これらの情報に基づいて進捗管理を行う。そして、9月1日～9月8日の期間内に実施した方が良いという営業基本行為だけを取り出し、それを表示制御部7を介して表示部8に表示させるようにしている。

【0063】このように、本実施形態では、マネージャーが営業活動計画（営業の実施企画）としてあらかじめ登録しておいた種々の営業行為のうち、実施すべきタイミングになった行為だけを表示して営業マンに知らせるようにしている。

【0064】したがって、マネージャーなどの支援組織が、個々の営業マンが使用するパソコン上に上述のような情報登録をあらかじめ行っておけば、そのパソコンを使う営業マンは、営業生産性を向上させるために最適な次の一手を常に知ることができるようになる。すなわち、ごく普通の営業マンでも、生産性の高い営業活動を行うために、どの顧客に、どのタイミングで、何をすべきかがタイムリーに分かるようになる。

【0065】営業マンが実際に「長島興業」に関して9月4日に行う営業行為を登録するには、上記営業有効行為表示欄72あるいは営業基本行為表示欄73に表示されている種々の営業行為の中から1つまたは2つ以上の行為をマウス23でクリックすれば良い。

【0066】なお、以上に述べた例では、マネージャーがあらかじめ行う情報登録の処理、およびその登録した情報に基づいて営業マンが実際に行う営業行為の登録処理の何れも、同じ計画作成部4を用いて行うようにしているが、マネージャーが使っているパソコン内の計画作成部4で作成した営業計画のデータを、図示しないネットワークを介して営業マンが使用するパソコン内にあらかじめ登録しておくようにしても良い。

【0067】また、図7の営業ステータス表示欄74には、営業活動の結果報告時にキーボード22により入力されたり、図示しない携帯端末により現場で入力されたりした具体的な文字情報が一覧表示されている。営業マンは、この過去の情報を参照して今後の活動計画を変更し、それを追加登録することもできる。

【0068】操作は至って簡単であり、一覧ボタン75を押すことによって現在表示されていない他の営業行為（実施タイミングでない営業行為を含む）を全て表示させ、その中から所望の項目をマウスクリックするだけで良い。

【0069】また、上述したように、計画作成部5は、

商談プロセスの作成も行う。本実施形態の計画作成部5は、営業生産性を向上させるために最適な商談プロセスをパソコン上で簡単に作成することができるようにしている。商談プロセスの作成は、図8の画面に基づいて行う。この図8に示した画面は、顧客との個別商談ごとの情報を整理して表示したものであり、ガイド表示欄81には、その商談を受注に導くまでのガイドラインが示されている。

【0070】商談は、基本的に相手の状況に合わせて実施するものであるため、最初から厳密にスケジュールを作成しても、必ずしもその通りになるというものではない。したがって、このガイド表示欄81には、キーとなる有効行為だけを並べたものを表示している。このキーとなる有効行為もマネージャーによって顧客別進捗データ記憶部25にあらかじめ記憶されたものである。

【0071】また、図8の営業ステータス表示欄74には、図7で説明した過去の情報の他に、他の営業マンやマネージャーが使用する別のパソコンで入力され、図示しないネットワークを介して送られてくるアドバイスなどの商談進捗に関する具体的な文字情報（3段目のコメント）も表示されている。

【0072】営業マンは、このアドバイスなどの文字情報を参照して、商談プロセスとして行う行為を追加あるいは変更することができる。すなわち、打ち合わせ・その他のボタン82を押すと営業行為の追加入力画面が現れるので、そこでガイドラインにない営業行為を追加入力することができる。このように、本実施形態では、顧客別の手帳を開き、様々なデータを見ながら具体的な作戦を対話的に立てることができる。

【0073】なお、このような商談プロセスを何件計画したかを容易に把握できるようにするために、図5に示した月間訪問予定／実績入力画面において、商談件数を表示するエリアを更に加えることが可能である。

【0074】このようにすれば、営業マンは、この商談件数と、訪問回数目標値を表す白抜きの□の数と、色分け表示された顧客名、訪問予定／実績の日付および訪問件数の合計とを見ることにより、「バランス良い訪問活動を行うためにどこに訪問すべきか」と「今抱えている商談をこなすためにどこに訪問すべきか」という2つの観点から判断することができる。その結果、全体のバランスを見ながら訪問すべき顧客を的確に判断することができ、より実戦的な訪問力の配分を行うことができるようになる。

【0075】また、図8において、終了ボタン83を押してこの手帳の画面を閉じると、次に図9のような画面が現れる。本実施形態では、種々の営業行為のデータが顧客別進捗データ記憶部25に記憶されているだけでなく、その営業行為の実施にあたって必要となるツールのデータがツールデータベース記憶部27に記憶されている。

【0076】そして、図9の画面では、計画した営業行為を実施する際に必要なツールが一覧表示されるようになっている。これにより、その営業行為の実施に必要なツールをまとめて印刷部9より出力させることができる。その際、そのツールには顧客の宛て名や担当者名などが入れられるため、オンリーユーなツールを演出することができる。

【0077】なお、以上に説明した図1の顧客評価・分類部2、目標値設定部3、計画作成部4、実績登録部5、進捗管理部6および表示制御部7は、図2に示したパソコン本体1に内蔵されている図示しないCPU、ROM、RAMなどによって構成されている。

【0078】

【発明の効果】本発明は上述したように、上記計画作成手段により作成された営業活動計画および上記実績登録手段により登録された活動結果の各データに基づいて、営業活動の進捗を、所定のサイクルで繰り返して実施する営業基本行為、あらかじめ設定した日程通りに実施する営業有効行為、および商談における一連の営業行為を並べた商談プロセスの3種類に分けて管理する進捗管理手段を設けたので、種々の営業活動の中で性質が異なる営業有効行為と営業基本行為と商談プロセスとの3種類の観点から営業活動の進捗を的確に把握することができ、営業マンは、営業生産性を向上させるために最適な営業活動の計画をより容易に作成することができるようになる。

【0079】また、本発明の他の特徴によれば、営業マンの営業活動計画を作成する際に、日別に行う個々の営業行為を登録するための画面に、上記営業基本行為、上記営業有効行為および上記商談プロセスの実施企画を分けて表示するように制御する表示制御手段を設けたので、営業活動計画を立てる営業マンは、上記日別に行う個々の営業行為を登録する際に、今やるべき行為を上記3種類の観点から整理して理解することができ、営業生産性を向上させるために最適な営業活動の計画をより容易に作成することができるようになる。

【0080】また、本発明のその他の特徴によれば、営業活動の実施企画としてあらかじめ作成しておいた種々の営業行為のうち、上記実施企画に基づいて実施すべきタイミングになった行為だけを、日別に行う個々の営業行為の登録画面に表示するようにしたので、その登録画面を見た営業マンは、日ごとに実施すべき最適な営業行為をタイムリーに確認することができ、生産性の高い営業活動を行うために、どのタイミングで何をすべきかを的確に理解することができるようになる。

【0081】以上のことにより、本発明によれば、営業活動の最適な標準化を図り、営業生産性を革新的に向上させることができる。

【図面の簡単な説明】

【図1】本発明の営業生産性向上支援システムの要素的

特徴を示す機能ブロック図である。

【図2】図1に示した各機能ブロックを具体的に実施するためのハードウェア構成を示す図である。

【図3】顧客評価・分類部による顧客の評価・分類法を説明するための図である。

【図4】月間訪問予定／実績入力画面（実績入力モード）の例を示す図である。

【図5】月間訪問予定／実績入力画面（予定入力モード）の例を示す図である。

【図6】訪問目的の入力画面の例を示す図である。

【図7】営業行為予定／実績入力画面（1ページ目）の例を示す図である。

【図8】営業行為予定／実績入力画面（2ページ目）の例を示す図である。

【図9】ツール一覧表示画面の例を示す図である。

【符号の説明】

1 データ入力部

2 顧客評価・分類部

3 目標値設定部

4 計画作成部

5 実績登録部

6 進捗管理部

7 表示制御部

8 表示部

9 印刷部

21 パソコン本体

22 キーボード

23 マウス

24 ディスプレイ装置

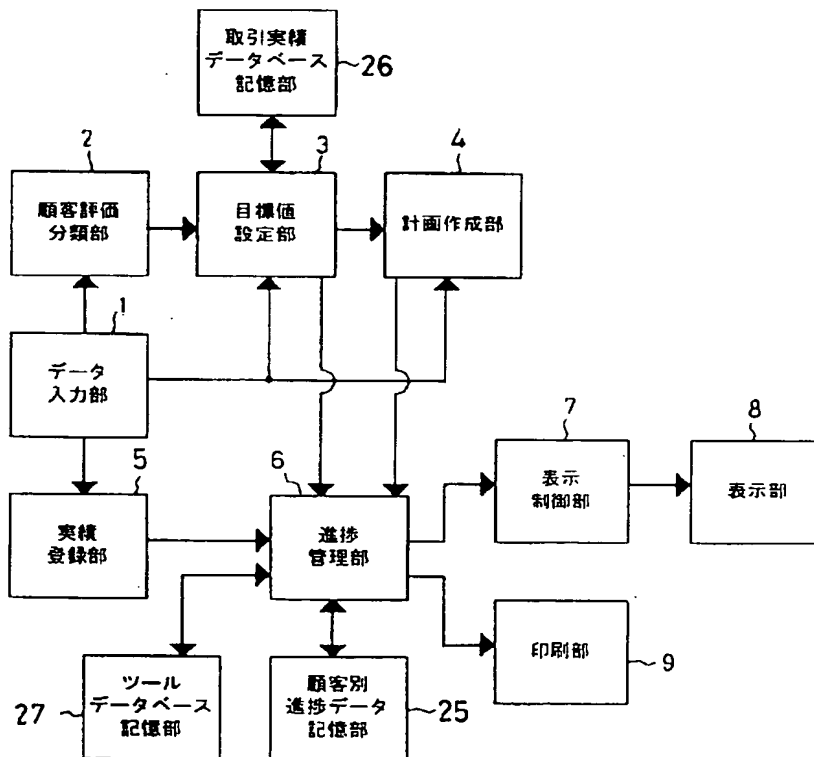
25 顧客別進捗管理データ記憶部

26 取引実績データ記憶部

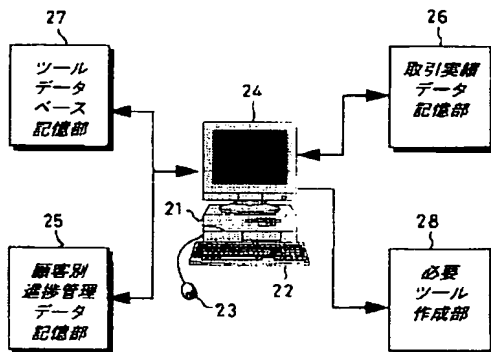
27 ツールデータベース記憶部

28 必要ツール作成部

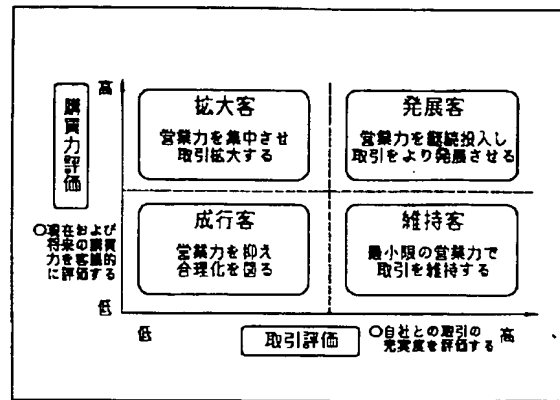
【図1】



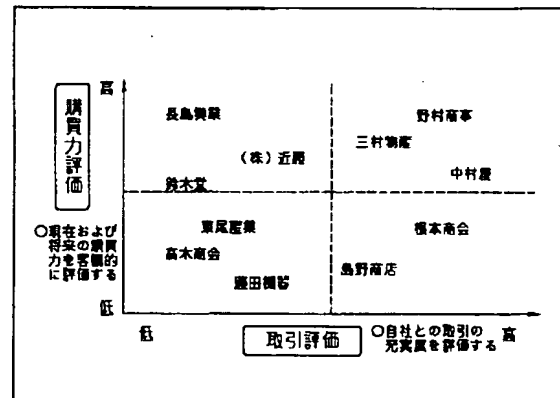
【図2】



【図3】



(a)



(b)

【図4】

月間訪問予定/実績入力

予定印刷 閉じる

9月 販売二課 鈴木 一郎 1995年9月18(金)

既存顧客 新規開拓顧客 情報源

顧客分類 顧客名 予定/実績表示 実績入力

顧客分類	顧客名	1	2	3	4	5	6	7	8	9	10	11	12	月	火	水	木	金	土	日	計
販売店	中村屋	21	29											26	27	28	29	30	31	1	情
販売店	野村商事	22	32	5										26	27	28	29	30	31	1	情
販売店	三村物産	24	30											26	27	28	29	30	31	1	情
販売店	近藤	30												26	27	28	29	30	31	1	情
販売店	鈴木堂	22	24	25										26	27	28	29	30	31	1	情
販売店	長島興業	24	25	1										26	27	28	29	30	31	1	情
販売店	島野商店	29												26	27	28	29	30	31	1	情
販売店	橋本商会	28												26	27	28	29	30	31	1	情
販売店	鹿吉	29												26	27	28	29	30	31	1	情
販売店	大下	22												26	27	28	29	30	31	1	情
販売店	岡崎	1												26	27	28	29	30	31	1	情
販売店	大豊	31												26	27	28	29	30	31	1	情

：発星 ●：拡大 ○：維持 ◎：成行 41a 42 44

既存顧客 新規開拓顧客 情報源

訪問件数 0

訪問件数 0

訪問件数 0

合計 0

45

【図5】

月間訪問予定/実績入力

予定印刷 閉じる

9月 15日 販売二課 鈴木 一郎 1995年9月18日(金)

既存顧客 新規開拓顧客 情報源

顧客分類	顧客名	予定/実績表示										予定入力						
		1	2	3	4	5	6	7	8	9	10	土	日	月	火	水	木	金
販売店	中村屋	2	2	2	2	2	2	2	2	2	2	2	3	4	5	6	7	8
販売店	野村商	2	2	2	2	2	2	2	2	2	2	2	3	4	5	6	7	8
販売店	三村物	2	2	2	2	2	2	2	2	2	2	2	3	4	5	6	7	8
販売店	近藤	2	2	2	2	2	2	2	2	2	2	2	3	4	5	6	7	8
販売店	鈴木堂	2	2	2	2	2	2	2	2	2	2	2	3	4	5	6	7	8
販売店	長島興	2	2	2	2	2	2	2	2	2	2	2	3	4	5	6	7	8
販売店	島野商	2	2	2	2	2	2	2	2	2	2	2	3	4	5	6	7	8
販売店	根本商	2	2	2	2	2	2	2	2	2	2	2	3	4	5	6	7	8
販売店	横吉	2	2	2	2	2	2	2	2	2	2	2	3	4	5	6	7	8
販売店	大下	2	2	2	2	2	2	2	2	2	2	2	3	4	5	6	7	8
販売店	岡崎	2	2	2	2	2	2	2	2	2	2	2	3	4	5	6	7	8
販売店	大豊	2	2	2	2	2	2	2	2	2	2	2	3	4	5	6	7	8

● : 発属 ● : 拡大 ● : 維持 ● : 減行 41a 42 44

既存顧客 訪問件数 0 0 1 1 0 0 0

新規開拓顧客 訪問件数 0 0 0 0 0 0 0

情報源 訪問件数 0 0 0 0 0 0 0

合計 0 0 1 1 0 0 0

45

【図6】

月間訪問予定/実績入力

予定印刷

9月 15日 既存顧客

顧客分類

販売店 販売店 販売店 販売店 販売店 販売店 販売店 販売店 販売店 販売店 販売店 販売店 販売店 販売店 販売店

● : 発属

既存顧客 新規開拓顧客 情報源

訪問目的入力

95/09/05 日の訪問目的を入力してください

62

61

7解

訪問件数 0 0 0 0 0 0 0

合計 0 0 1 1 0 0 0

営業行為予定 / 実績入力																																						
終了	顧客名: 長島興業	95年09月04日 予定入力	74 トピックス																																			
<div style="display: flex; justify-content: space-between;"> <div> <p>すべきこと 09/01-09/08 (キャンペーン)</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 50%;">名称</th> <th style="width: 50%;">営業行為</th> </tr> </thead> <tbody> <tr><td>写真新作展示会</td><td>出欠確認</td></tr> <tr><td>日曜わがママデー</td><td>結果報告・お礼</td></tr> <tr><td></td><td>わがママの感謝傳い</td></tr> <tr><td> </td><td> </td></tr> <tr><td> </td><td> </td></tr> <tr><td> </td><td> </td></tr> <tr><td> </td><td> </td></tr> <tr><td> </td><td> </td></tr> </tbody> </table> <p>(営業基本行為)</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 50%;">営業行為</th> <th style="width: 50%;">一覧</th> </tr> </thead> <tbody> <tr><td>お電話フォロー</td><td rowspan="5" style="text-align: center; vertical-align: middle;">75</td></tr> <tr><td>店頭在庫チェック</td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td><td style="text-align: center; vertical-align: middle;">73</td></tr> </tbody> </table> </div> <div style="width: 40%; text-align: center;"> <p>営業ステータス</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 30%;">実施日 西暦</th> <th style="width: 70%;">コメント</th> </tr> </thead> <tbody> <tr> <td>07/31 松井様長</td> <td>キャンペーンについては対象者名の中2名をし か達成できそうもない。 河原主任については 同行販売を依頼され た。</td> </tr> <tr> <td>08/07 河原主任</td> <td>毎朝化成へ同行訪問。 5台成約見込み。商品 知識が不足しているの で、営業マン向け勉強 会を早期実施する。</td> </tr> <tr> <td>08/11 宮藤部長</td> <td>クレーン屋まで訪問。 納期遅れが原因したた め、倉庫から引取係 員を先へ呼び、高 層部員からは以便力</td> </tr> </tbody> </table> <p style="text-align: center;">営業ステータス入力</p> </div> </div>		名称	営業行為	写真新作展示会	出欠確認	日曜わがママデー	結果報告・お礼		わがママの感謝傳い											営業行為	一覧	お電話フォロー	75	店頭在庫チェック					73	実施日 西暦	コメント	07/31 松井様長	キャンペーンについては対象者名の中2名をし か達成できそうもない。 河原主任については 同行販売を依頼され た。	08/07 河原主任	毎朝化成へ同行訪問。 5台成約見込み。商品 知識が不足しているの で、営業マン向け勉強 会を早期実施する。	08/11 宮藤部長	クレーン屋まで訪問。 納期遅れが原因したた め、倉庫から引取係 員を先へ呼び、高 層部員からは以便力	76
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83 終了 顧客名: 長島興業

営業行為予定/実績入力

95年09月04日 予定入力

74 トピックス

チャート
予定行為

すべきこと 09/01-09/08

受注予定日 95/11/30

受注金額 5,000 (千円)

受注確立 C中等

81 入力 追加

実行日	営業行為	メモ
08/03	現場見学	7月末
08/13	レイアウト打	
08/20	(再)レイアウト	
08/25	商品打ち合わせ	
	接客層提出	8月末
	見積り書提出	
	受注	11月末
	納品立ち会い	12月中旬

☆打ち合わせ・その他

営業ステータス

実施日 担当者	コメント
08/20 原係長	前面打ち合わせ時より、組織変更があり、再打レイアウト作り直し。次回商品打ち合わせ時に商品サンプルを持参する予定。
08/25 原係長	井原部長に、持参したサンプルの色が自社のイメージにあわないと指摘された。次回打ち合わせ時に再度サンプルを持参する予定。
08/26 須藤課長より	当社カーナーへ案内し、全体のイメージ、実際に活用しているときのイメージを井原部長にわかってもらい、さらに当社の

営業ステータス入力

【図9】

宝飾行為予定/実績入力

終了 顧客名: 長島興業 95年09月04日 予定入力 トピックス

キャンペーン

すべきこと 09/0

受注予定日 95/1

受注金額 5,000

受注確立 C15

水

高価日 登録行為

08/03 現場見学

08/13 レイアウト

08/20 (再)レイアウト

08/25 商品打ち合わせ

09/04 ショールーム案内

掲載写真提出

見積り書提出

受注

納品立ち会い

ツールの印刷

今週の計画の実施には以下のツールが必要です

ツールの印刷 0

日曜チャレンジキャンペーン結果報告書

ショールーム案内状

印刷しますか?

OK キャンセル

コメント 0

打ち合わせ時より
3回変更があり、
レイアウト作り直
す。商品打ち合わせ
商品サンプルを
送る予定。

手長に、持参した
ブルの色が自社の
ジに合わないとい
われた。次回打ち
合わせ時に再度サ
ンプルを送る予定。

メールで案内し、
イメージ、実際に
いるときのイメージ
部長にわかって
もらい、さらに当社の

☆打ち合わせ・その他 0

登録ステータス入力

【公報種別】特許法第17条の2の規定による補正の掲載
【部門区分】第6部門第3区分
【発行日】平成14年4月10日（2002. 4. 10）

【公開番号】特開平9-160979
【公開日】平成9年6月20日（1997. 6. 20）
【年通号数】公開特許公報9-1610
【出願番号】特願平7-321639
【国際特許分類第7版】

G06F 17/60

【F I】

G06F 15/21 Z
 L

【手続補正書】

【提出日】平成13年12月25日（2001. 12. 25）

【手続補正1】

【補正対象書類名】明細書

【補正対象項目名】特許請求の範囲

【補正方法】変更

【補正内容】

【特許請求の範囲】

【請求項1】 種々の顧客に対する営業活動計画を作成するとともに、その進捗を管理するための営業生産性向上支援システムであって、

所定のサイクルで繰り返して実施する営業基本行為、あらかじめ設定した日程通りに実施する営業有効行為、および商談における一連の営業行為を並べた商談プロセスの実施企画を作成するとともに、上記実施企画に基づいて日別に行う個々の営業行為を登録することにより、上記種々の顧客に対する営業活動計画を作成する計画作成手段と、

上記計画作成手段により作成された営業活動計画に基づく実際の活動結果を登録する実績登録手段と、
上記計画作成手段により作成された営業活動計画および上記実績登録手段により登録された活動結果の各データに基づいて、営業活動の進捗を、上記営業基本行為、上記営業有効行為および上記商談プロセスの3種類に分けて管理する進捗管理手段と、

上記日別に行う個々の営業行為を登録するための画面に、上記営業基本行為、上記営業有効行為および上記商談プロセスの実施企画を分けて表示するように制御する表示制御手段とを備えたことを特徴とする営業生産性向上支援システム。

【請求項2】 上記進捗管理手段は、上記計画作成手段により作成された種々の営業基本行為の実施企画および上記実績登録手段により登録された活動結果の各データに基づいて、上記日別に行う個々の営業行為を登録している時点で上記種々の営業基本行為が上記所定のサイク

ルに基づく実施期間内にあるかどうかを管理し、
上記表示制御手段は、上記進捗管理手段により上記所定のサイクルに基づく実施期間内にあるとされた営業基本行為だけを上記日別に行う個々の営業行為を登録するための画面に表示するように制御することを特徴とする請求項1に記載の営業生産性向上支援システム。

【請求項3】 上記進捗管理手段は、上記計画作成手段により作成された種々の営業有効行為の実施企画および上記実績登録手段により登録された活動結果の各データに基づいて、上記日別に行う個々の営業行為を登録している時点で上記種々の営業有効行為が上記設定した日程に基づく実施期間内にあるかどうかを管理し、

上記表示制御手段は、上記進捗管理手段により上記設定した日程に基づく実施期間内にあるとされた営業有効行為だけを上記日別に行う個々の営業行為を登録するための画面に表示するように制御することを特徴とする請求項1に記載の営業生産性向上支援システム。

【請求項4】 上記進捗管理手段は、上記計画作成手段により作成された種々の営業基本行為および種々の営業有効行為の実施企画と、上記実績登録手段により登録された活動結果との各データに基づいて、上記日別に行う個々の営業行為を登録している時点で上記種々の営業基本行為が上記所定のサイクルに基づく実施期間内にあるかどうか、および上記日別に行う個々の営業行為を登録している時点で上記種々の営業有効行為が上記設定した日程に基づく実施期間内にあるかどうかを管理し、
上記表示制御手段は、上記進捗管理手段により上記所定のサイクルに基づく実施期間内にあるとされた営業基本行為および上記設定した日程に基づく実施期間内にあるとされた営業有効行為だけを上記日別に行う個々の営業行為を登録するための画面に表示するように制御することを特徴とする請求項1に記載の営業生産性向上支援システム。

【請求項5】 種々の顧客に対する営業活動計画を作成するとともに、その進捗を管理するための営業生産性向

上支援システムであって、
上記種々の顧客に対する営業活動計画を、種々の営業行為を含む営業の実施企画を作成するとともにその実施企画に基づいて日別に行う個々の営業行為を登録することにより作成する計画作成手段と、

上記計画作成手段により作成された営業の実施企画に含まれる種々の営業行為のうち、上記実施企画に基づいて実施すべきタイミングになった行為だけを、上記日別に行う個々の営業行為を登録するための画面に表示するように制御する表示制御手段とを備えたことを特徴とする営業生産性向上支援システム。

【請求項6】 上記計画作成手段は、上記日別に行う個々の営業行為と当該営業行為で使用する顧客宛ての書類との関連付けを定義するための手段と、
上記個々の営業行為に関連付けが定義されている上記顧客宛ての書類を自動提示する手段とを含むことを特徴とする請求項1～5の何れか1項に記載の営業生産性向上支援システム。

【請求項7】 上記実績登録手段は、実際の活動結果に対する任意のコメントを入力するための手段を備え、
上記表示制御手段は、上記入力されたコメントを上記日別に行う個々の営業行為を登録するための画面に表示するように制御することを特徴とする請求項1～6の何れか1項に記載の営業生産性向上支援システム。

【手続補正2】

【補正対象書類名】明細書

【補正対象項目名】0009

【補正方法】変更

【補正内容】

【0009】

【課題を解決するための手段】本発明の営業生産性向上支援システムは、種々の顧客に対する営業活動計画を作成するとともに、その進捗を管理するための営業生産性向上支援システムであって、所定のサイクルで繰り返して実施する営業基本行為、あらかじめ設定した日程通りに実施する営業有効行為、および商談における一連の営業行為を並べた商談プロセスの実施企画を作成するとともに、上記実施企画に基づいて日別に行う個々の営業行為を登録することにより、上記種々の顧客に対する営業活動計画を作成する計画作成手段と、上記計画作成手段により作成された営業活動計画に基づく実際の活動結果を登録する実績登録手段と、上記計画作成手段により作成された営業活動計画および上記実績登録手段により登録された活動結果の各データに基づいて、営業活動の進捗を、上記営業基本行為、上記営業有効行為および上記商談プロセスの3種類に分けて管理する進捗管理手段と、上記日別に行う個々の営業行為を登録するための画面に、上記営業基本行為、上記営業有効行為および上記商談プロセスの実施企画を分けて表示するように制御する表示制御手段とを備えたことを特徴とする。

【手続補正3】

【補正対象書類名】明細書

【補正対象項目名】0010

【補正方法】変更

【補正内容】

【0010】本発明の他の態様では、上記進捗管理手段は、上記計画作成手段により作成された種々の営業基本行為の実施企画および上記実績登録手段により登録された活動結果の各データに基づいて、上記日別に行う個々の営業行為を登録している時点で上記種々の営業基本行為が上記所定のサイクルに基づく実施期間内にあるかどうかを管理し、上記表示制御手段は、上記進捗管理手段により上記所定のサイクルに基づく実施期間内にあるとされた営業基本行為だけを上記日別に行う個々の営業行為を登録するための画面に表示するように制御することを特徴とする。

【手続補正4】

【補正対象書類名】明細書

【補正対象項目名】0011

【補正方法】変更

【補正内容】

【0011】本発明のその他の態様では、上記進捗管理手段は、上記計画作成手段により作成された種々の営業有効行為の実施企画および上記実績登録手段により登録された活動結果の各データに基づいて、上記日別に行う個々の営業行為を登録している時点で上記種々の営業有効行為が上記設定した日程に基づく実施期間内にあるかどうかを管理し、上記表示制御手段は、上記進捗管理手段により上記設定した日程に基づく実施期間内にあるとされた営業有効行為だけを上記日別に行う個々の営業行為を登録するための画面に表示するように制御することを特徴とする。

【手続補正5】

【補正対象書類名】明細書

【補正対象項目名】0012

【補正方法】変更

【補正内容】

【0012】本発明のその他の態様では、上記進捗管理手段は、上記計画作成手段により作成された種々の営業基本行為および種々の営業有効行為の実施企画と、上記実績登録手段により登録された活動結果との各データに基づいて、上記日別に行う個々の営業行為を登録している時点で上記種々の営業基本行為が上記所定のサイクルに基づく実施期間内にあるかどうか、および上記日別に行う個々の営業行為を登録している時点で上記種々の営業有効行為が上記設定した日程に基づく実施期間内にあるかどうかを管理し、上記表示制御手段は、上記進捗管理手段により上記所定のサイクルに基づく実施期間内にあるとされた営業基本行為および上記設定した日程に基づく実施期間内にあるとされた営業有効行為だけを上記

日別に行う個々の営業行為を登録するための画面に表示するように制御することを特徴とする。

【手続補正6】

【補正対象書類名】明細書

【補正対象項目名】0013

【補正方法】変更

【補正内容】

【0013】本発明のその他の態様では、種々の顧客に対する営業活動計画を作成するとともに、その進捗を管理するための営業生産性向上支援システムであって、上記種々の顧客に対する営業活動計画を、種々の営業行為を含む営業の実施企画を作成するとともにその実施企画に基づいて日別に行う個々の営業行為を登録することにより作成する計画作成手段と、上記計画作成手段により作成された営業の実施企画に含まれる種々の営業行為のうち、上記実施企画に基づいて実施すべきタイミングになった行為だけを、上記日別に行う個々の営業行為を登録するための画面に表示するように制御する表示制御手段とを備えたことを特徴とする。

【手続補正7】

【補正対象書類名】明細書

【補正対象項目名】0014

【補正方法】変更

【補正内容】

【0014】本発明のその他の態様では、上記計画作成手段は、上記日別に行う個々の営業行為と当該営業行為で使用する顧客宛ての書類との関連付けを定義するための手段と、上記個々の営業行為に関連付けが定義されている上記顧客宛ての書類を自動提示する手段とを含むことを特徴とする。

【手続補正8】

【補正対象書類名】明細書

【補正対象項目名】0015

【補正方法】変更

【補正内容】

【0015】本発明のその他の態様では、上記実績登録手段は、実際の活動結果に対する任意のコメントを入力するための手段を備え、上記表示制御手段は、上記入力されたコメントを上記日別に行う個々の営業行為を登録するための画面に表示するように制御することを特徴とする。

【手続補正9】

【補正対象書類名】明細書

【補正対象項目名】0016

【補正方法】変更

【補正内容】

【0016】本発明は上記技術手段より成るので、種々の営業活動の中で性質が異なる営業有効行為と営業基本行為と商談プロセスとがそれぞれ別々に整理して進捗管理されるようになり、営業活動の進捗を上記3種類の観点からの確に把握することが可能となる。また、本発明によれば、日別に行う営業行為の登録画面に、上述のようにして別々に進捗管理されている営業基本行為と営業有効行為と商談プロセスとが分けて表示されるようになるので、営業活動計画を立てる営業マンは、上記日別に行う個々の営業行為を登録する際に、今やるべき行為を上記3種類の観点から整理して理解することが可能となる。

【手続補正10】

【補正対象書類名】明細書

【補正対象項目名】0017

【補正方法】変更

【補正内容】

【0017】また、本発明の他の特徴によれば、営業活動の実施企画としてあらかじめ作成しておいた種々の営業基本行為あるいは種々の営業有効行為のうち、上記実施企画に基づいて実施すべきタイミングになった行為だけが、日別に行う個々の営業行為の登録画面に表示されるようになるので、その登録画面を見た営業マンは、日ごとに実施すべき最適な営業行為を適時に確認することが可能となる。また、本発明のその他の特徴によれば、種々の営業行為に対して、それぞれの営業行為で使用する顧客宛ての書類との関連付けをあらかじめ定義することが可能であり、この関連付けが定義されている場合には、営業計画の作成の際に選択した営業行為に関連付けられている顧客宛ての書類が自動的に提示されるので、営業マンが営業計画実施時に必要な書類を特に意識しなくても、その書類を確実に得ることが可能となる。また、本発明のその他の特徴によれば、営業マンは、実際の営業活動に対して入力されたコメント（マネージャー等により入力されるアドバイス等を含む）を参照して今後の活動計画を作成することが可能となり、具体的な作戦を対話的に立てることができる。